



The 23rd Annual

Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**
in association with Colonial Consulting, LLC

ADMINISTRATION / FINANCE TRACK

Session 2: 11:00 am – 12:15 pm

Topic:

On Track for Success: Using Your Fundraising Database to Increase Your Productivity

Presented by:

Bill Connors, CFRE, bCRE-Pro

Workshop Summary:

Your fundraising database can be your friend! You don't have to be a tech guru to use your fundraising database, whatever it may be, to help keep you on track and make you even better at what you do. In non-technical terms let's discuss the reasonable things you can and should record in your database; statistics you can and should be looking at regarding your prospects and activities; and the kinds of reports you can and should ask your database support team to give you so you can get on track, stay on track, go faster and raise more.

Workshop Presenter



Bill Connors, CFRE, bCRE-Pro, is an independent consultant and trainer on *The Raiser's Edge* and author of *Fundraising with The Raiser's Edge: A Non-Technical Guide* (Wiley 2010). Until 2005, Bill was Principal Consultant for Fundraising Systems for Blackbaud, having helped found the Blackbaud consulting program in 1998. He has been providing consulting and training on *The Raiser's Edge* worldwide since 1995. Bill has spent his entire career in nonprofit work and previously served as Senior Consultant for Fundraising Technology for a London fundraising consulting firm and worked for Junior Achievement as a Director of Development and for the national headquarters, overseeing the roll-out of *The Raiser's Edge* nationwide. Bill is an honors graduate of Yale University with a master's degree from Brigham Young University. And Bill loves sweets...ice cream especially.

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► **(ON) TRACK FOR SUCCESS:
USING YOUR FUNDRAISING DATABASE
TO INCREASE YOUR PRODUCTIVITY**

Bill Connors, CFRE, bCRE-Professional

Independent Consultant on The Raiser's Edge

April 29, 2015



► **PRESENTATION'S REAL SUBTITLE**

What can your fundraising database and database staff do to actually help you get things done and give you actionable information that assures you you're doing the right things, you're on track, you're going to be successful, you've *been* successful, rather than being a pain in the @\$ to you?

By a database person who understands it's about you and your success, not the database's.

► AGENDA

1. Prospect research
2. Identifying planned giving prospects from our database
3. Mailings
4. Planned giving events
5. Planned gift fundraising
6. Planned gift intentions and realized gifts
7. A final plea

► SOFTWARE PROGRAMS ILLUSTRATED

- The Raiser's Edge v. 7 and Raiser's Edge NXT from Blackbaud
- Exceed Beyond from Telosa (thanks to Chris Fink)
- And the others do this, too

► PROSPECT RESEARCH/IDENTIFYING PROSPECTS

We can do this for you

Your Organization
NEXT STEP REPORT

Susan's Prospects - Status Update

Rating: 3 - \$500,000-\$999,999

Step: No recent gift and no contact in more than a year. Reconnect to build the relationship.

| | Last Gift | Last Completed Action |
|---------------------------------------------------|-----------------------|-----------------------|
| Mr. Chris Bancroft and Dr. Terry Sanders-Bancroft | 11/16/2009 500,000.00 | 09/06/2011 |

Rating: 6 - \$50,000-\$99,999

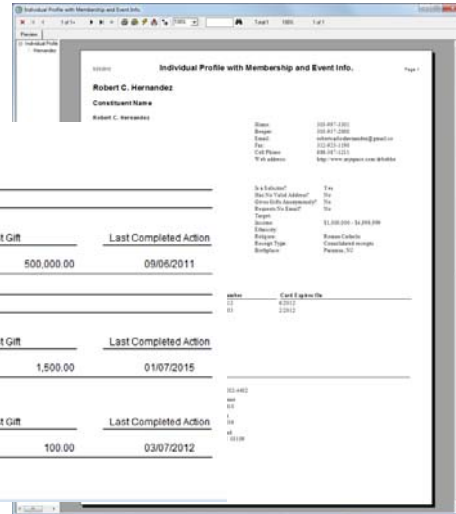
Step: Current donor. Stay in touch and consider upgrading next year to a higher giving level.

| | Last Gift | Last Completed Action |
|---------------------|---------------------|-----------------------|
| Mr. Michael Barrett | 03/07/2015 1,500.00 | 01/07/2015 |

Step: Last gift was more than a year ago. Ask again this year to give at least as much as last year.

| | Last Gift | Last Completed Action |
|--------------------------------------------------|-------------------|-----------------------|
| Mr. James Anderson and Mrs. Ann O'Brien-Anderson | 04/07/2014 100.00 | 03/07/2012 |

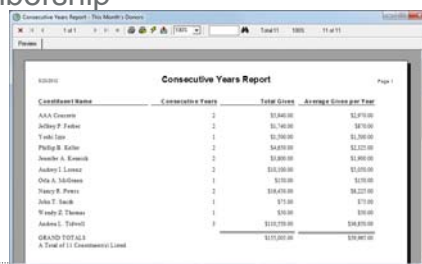
- END OF REPORT -



► IDENTIFYING PLANNED GIVING PROSPECTS

Use the database to find prospects

- Giving amount?
- Ongoing commitment
 - Consecutive years, frequent giving
 - Volunteerism, board membership
 - Events
 - Membership
- Relationships
- Contacts (Actions)



► **PLANNED GIVING MAILINGS**

You're in charge of the this process, measure it also

- # Sent
 - All mailings sent should be tracked at the summary and detail level
- # Responded
 - Responses can be recorded whether there is a gift or not
- # Gifts
 - Gifts should indicate their source

► **PLANNED GIVING MAILINGS**

- # and \$ Gifts
- \$ Mailing Cost
- ROI: \$ Raised vs. \$ Cost

MAILING ANALYSIS REPORT
Planned Giving Appeals

| REASON | \$ COST | # SENT | # RETURNED | \$ RETURNED | \$ GOAL | NET RETURN | % RETURN | % GOAL | AVERAGE GIFT \$ GROSS | AVERAGE GIFT \$ NET |
|--------------------------|----------|--------|------------|-------------|-----------|------------|----------|--------|-----------------------|---------------------|
| Annual Appeal 2014 | 1,300.00 | 500 | 97 | 79,792.00 | 10,000.00 | 78,492.00 | 19.40 | 797.92 | 822.60 | 809.20 |
| Direct Mailing Fall 2014 | 500.00 | 5,000 | 21 | 13,160.00 | 10,000.00 | 12,660.00 | 0.42 | 131.00 | 626.67 | 602.96 |

► PLANNED GIVING EVENTS

It's easier if they're in the database

- # Invitations
- # Registrations
- # Attended
- # and \$ Gifts
- \$ Event Cost
- ROI: \$ Raised vs. \$ Cost

| Name | RSVP Status | # Attending | Gift Amount | Record # | Paid |
|----------------------------------------|-------------|-------------|-------------|----------|-------------------------------------|
| APEX Race Parts, Inc. | Accepted | 1 | 3,000.00 | 128 | <input checked="" type="checkbox"/> |
| Mr. Guida Blois and Mrs. Helen Sanders | Invited | 0 | 0.00 | 40 | <input type="checkbox"/> |
| Mr. and Mrs. Gregg Davis | Accepted | 2 | 200.00 | 42 | <input type="checkbox"/> |
| Mr. Christopher Fink | Accepted | 5 | 0.00 | 43 | <input type="checkbox"/> |
| Mr. and Mrs. Jason Fisher | Declined | 0 | 0.00 | 41 | <input type="checkbox"/> |
| Bill Gates | Invited | 0 | 0.00 | 39 | <input type="checkbox"/> |

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► PLANNED GIFT FUNDRAISING

Use the database to track and report your prospects

- What's your "methodology"; for example:
 - Seven stages
 - "Moves management"
- "Ownership" of your portfolio
- Use of contact management and note functionality
- Tickling and reporting

We don't want to be the tail wagging the dog



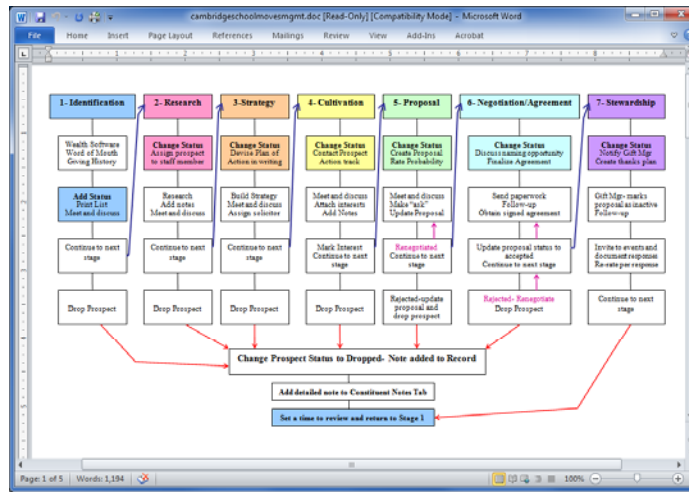
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▶ PLANNED GIFT FUNDRAISING



▶ PLANNED GIFT FUNDRAISING

Prospect Pipeline
As of 5/29/2012 8:09:24 AM

| Subject Name | Accepted | Active | Collected | Pending | Proposed | Submitted | Submitted/Cancelled | Proposed | Accepted | Accepted/Cancelled | Accepted | Total | Proposed Total |
|-------------------|----------|--------|-----------|---------|----------|-----------|---------------------|----------|----------|--------------------|----------|-------|----------------|
| Albert E. Andrews | | 1 | | | | | | | | | | 1 | \$7,412 |
| Franklin D. ... | | | | | | | | | | | | 1 | \$,000 |
| Robert C. ... | | | | | | | | | | | | 1 | \$,000 |
| Carl H. ... | | | | | | | | | | | | 1 | \$,000 |
| Samuel ... | | | | | | | | | | | | 1 | \$,000 |
| Andrew L. ... | | | | | | | | | | | | 1 | \$,000 |
| David C. ... | | | | | | | | | | | | 1 | \$7,412 |
| Laura A. ... | | | | | | | | | | | | 1 | \$,000 |
| William ... | | | | | | | | | | | | 1 | \$,000 |

Prospect List
As of 5/29/2012 8:09:24 AM

| Subject Name | No. of Prospects | Total Cost | Total Proposed Amount |
|-------------------|------------------|--------------|-----------------------|
| Albert E. Andrews | 11 | \$18,800.00 | \$220,000.00 |
| William ... | 2 | \$2,500.00 | \$2,500.00 |
| Robert C. ... | 4 | \$6,000.00 | \$6,000.00 |
| Carl H. ... | 7 | \$12,200.00 | \$5,000.00 |
| Samuel ... | 3 | \$22,000.00 | \$2,000.00 |
| Andrew L. ... | 2 | \$700.00 | \$700.00 |
| David C. ... | 5 | \$500,000.00 | \$180,000.00 |
| Laura A. ... | 2 | \$125.00 | \$125.00 |
| William ... | 1 | \$10,000.00 | \$10,000.00 |

► PROSPECT DATA ENTRY

- Assignment
- Interactions
- Notes
- Proposals/Opportunities

Campaign Overview **Prospect List** Gift Range Chart Solicitors / Teams

Filter

Show 10 rows Showing 11 to 20 of 39 Sorting: Hold SHIFT Key...

| Name | Ask Amount | Stage Name | Ask Range | Gift Amount | Notes |
|-----------------|------------|------------|-----------|--------------|-----------------|
| Gates, Bill | 500,000.00 | Solicit | | 0.00 | |
| Gossett, Truitt | 5,000.00 | Cultivate | | 25.00 | |
| Hanks, Tom | 75,000.00 | Research | | 0.00 | |
| Helper, Joe | 15,000.00 | Prepare | | 0.00 | |
| Ford, Henry | 500,000.00 | Steward | | 500,000.00 | |
| Tot: | | | | 1,145,000.00 | Tot: 923,315.00 |

Show 10 rows Showing 11 to 20 of 39 First Prev 2 Next Last

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► ASSIGNMENTS

Raiser's Edge | Blackboard Partners | Search for a constituent | Welcome, Bill Connors

Work Center Fundraising for Bill Connors

Portfolio 3 Gifts 66 Actions 23 Proposals

3 Constituents

| Constituent summary | Solicitor relationship | Constituent roles | First gift | Last gift | Greatest gift | Prospect status | Last action | Next action |
|-------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Mark Adamson 121 Sandstone Way Charleston, SC 29401 madamson@connors.net 843-789-8000 | Anne Sinclair - Membership Audrey Lorenz - Fund more | Trustee | \$100 donation 11/14/2003 2003 Membership Fund | \$75 donation 11/15/2005 2005 Annual Fund | \$5,000 donation 4/25/2008 International Relief Fund | Research | Name | Meeting - Lecture 4/14/2008 2/14/2008 Held in the board room quarterly. See more |
| Robert Hernandez 418 1/2h Street Stevens, NJ 07081-4412 robertcarlos@hernandezgroup.com 303-987-3201 | Audrey Lorenz - Staff Bill Connors - Staff more | Board Member 1/1/2003 - Present Volunteer 3/2/2003 - Present more | \$1,000 donation 6/3/2002 Natural Disaster Relief Fund | \$100 donation 3/3/2010 Natural Disaster Relief Fund | \$50,000 donation 4/19/2005 Natural Disaster Relief Fund | Active | Task/Other - Visit 3/3/2007 4/15/2007 Dr. Hernandez came to visit the campus to see about plans for a mental health clinic. He would be interested in funding part of that project. See more | Mailing - Birthday 4/15/2008 7/14/2008 See more |
| John Smith 421 Windsor Road Louisville, KY 40213 502-553-6236 | Bill Connors - Campaign | Volunteer 1/1/2002 - Present | \$100,000 donation 1/22/2003 Building Fund | \$250 donation 8/29/2007 Acquisition Fund | \$50,000 donation 1/22/2003 Building Fund | Stewardship | Meeting - Solicitation 1/22/2003 Kathleen Berry 4/13/2003 See more | Phone call - Phone Call 1/21/2008 Audrey Lorenz 11/14/2008 Regarding phoruban plans for next year. See more |

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► INTERACTIONS

| Contributor summary | Date | Status | Action summary | Assigned to | Category | Proposal | Subscriber relationship | Type |
|------------------------------------------------------------------------------------------------------------|-------------------|---------|---------------------|------------------|------------|----------|-----------------------------------------------|---------------------|
| Mark Adamson 125 Sowerden Way Charleston, SC 29405 adamson@bcre.com 843.768.4839 | 3/4/2015 | | Birthday | Mark Adamson | Phone call | | Bill Connors - Audrey Lerner - Event more | Birthday |
| Mark Adamson 125 Sowerden Way Charleston, SC 29405 adamson@bcre.com 843.768.4839 | 1/9/2009 | Expired | Letter | Mark Adamson | Meeting | | Bill Connors - Audrey Lerner - Event more | Letter |
| John Smith 621 Wenden Road Charleston, SC 29412 302.554.4238 | 3/1/2009 | Expired | Thank You | John Smith | Phone call | | Bill Connors - Campaign | Thank You |
| Robert Hernandez 410 S 7th Street Denver, CO 80202-4422 robert.hernandez@bcre.com 303.967.2287 | 3/19/2009 | Expired | Brochure/Invitation | Robert Hernandez | Meeting | | Tim Burns - Staff - Michael Carr - Staff more | Brochure/Invitation |
| Robert Hernandez 410 S 7th Street Denver, CO 80202-4422 robert.hernandez@bcre.com 303.967.2287 | 3/14/2009 | Expired | Correspondence | Robert Hernandez | Email | | Tim Burns - Staff - Michael Carr - Staff more | Correspondence |
| Mark Adamson 125 Sowerden Way Charleston, SC 29405 adamson@bcre.com 843.768.4839 | 3/13/2009 | Expired | Dinner Meeting | Mark Adamson | Meeting | | Bill Connors - Audrey Lerner - Event more | Dinner Meeting |
| John Smith John Smith - House | 3/1/2009 12:00 PM | | Birthday | John Smith | | | | |

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► NOTES

Notes and actions

6 Notes 18 Actions

- Notes - Career** (4/1/2015)
 - Clarewing of Pediatric Clinic with Partner Dr. Hernandez plans to leave the pharmaceutical company to open a practice with his former colleagues and friends. There will be an opening tag that he will offer free pediatric exams to certain areas of town. See more
- Notes - Director's Notes** (3/1/2015)
 - Clear selection for next year. Possible that Dr. Hernandez may step down from the board next year to pursue additional medical research activities. Schedule lunch date to discuss options. See more
- Dinner Meeting - Meeting (Assigned to Muhammad Rahman)** (3/14/2009)
 - Approved
- Dinner Meeting - Meeting (Assigned to Muhammad Rahman)** (3/13/2009)
 - Approved
- Correspondence - Meeting (Assigned to Muhammad Rahman)** (3/14/2009)
 - Approved

Relationships

| Name | Relationship | Last dates |
|-------------------|--------------------|---------------------|
| Michael Schreiber | Subscriber - Staff | 3/31/2015 - Present |
| Jeff Ogden | Subscriber - Staff | 3/31/2015 - Present |
| Michael Carr | Subscriber - Staff | 3/31/2015 - Present |
| Mark Adamson | Subscriber - Staff | 3/31/2015 - Present |

Ratings

No rating - Overall wealth rating - Not
 #10000 - Source: WealthSource Analytics - Not
 Based on data from WealthSource Target Analytics

997 - Major Gift (Estimated) - Not
 \$100,000 - Source: WealthSource Analytics - Not

\$500,000 - \$999,999 - Major Giving Capacity - Not
 \$100,000 - Source: WealthSource Analytics - Not

\$10,000,000+ - Estimated Wealth Rating - Not
 \$100,000 - Source: WealthSource Analytics - Not

774 - Annual Giving (Estimated) - Not
 \$100,000 - Source: WealthSource Analytics - Not

Proposed research

Current information
 Proposed status: **Active**

Classification: Individual

Financial information summary
 \$10.3M - Total estimated assets
 Contributions: No philanthropic gifts
 No financial contributions

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► **PLANNED GIVING FUNDRAISING METRICS**

- # of Interactions
 - Substance
 - Substantial interactions, such as face-to-face meetings
 - Other interactions, such as notes and emails
 - Timeframe
 - Completed
 - Scheduled
 - % Goal

► **PLANNED GIVING FUNDRAISING METRICS**

- # and \$ of Proposals
 - Total
 - Portfolio
 - Stage
- % of Goals

► TRACKING PLANNED GIFTS

Help us understand, organize, and report your success

- # of Legacy Society members
 - Couples count as 1 or 2?
 - Deceased still count?
- # and \$ Specific planned gift intentions
- # and \$ Realized planned gifts
 - “Bequest” and gift coding

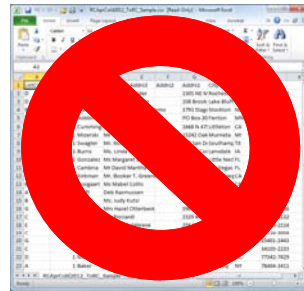
► PRESENTATION PREFERENCES

- Format
 - In the software
 - Emailed
 - Hard copy
- Numbers vs. charts and graphs

► FAVOR, PLEASE...PRETTY, PRETTY PLEASE 😊😊😊😊

Excel is not a database!

- Excel—no!
- Fundraising software—yes!
- Planned giving software—yes, too!
 - Crescendo
 - PG Calc



► SUMMARY: PG AND DATABASE PROFESSIONALS

- #1: Pick the few metrics that are most helpful to you
- #2: Work with your database team to implement
- #3: Participate in the data entry
- #4: Use the reports and the metrics
- #5: Review and revise
- #6: Grow

► Q&A AND CONTACT INFORMATION

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