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**The 5 Biggest Mistakes in Handling Donor Data**

GuideStar USA outlined the seven most common mistakes in handling donor data. Jcamp 180 highlighted it recently. Here is the direct link: <https://www.facebook.com/JCamp180/posts/10153648946361648>

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What follows is an abbreviated version shortened for Jcamp 180 camps.

**Mistake One – Assuming Data Entry/Gift Entry Needs No Guidelines**

This one is huge! Time after time, as we help even large and well known charities convert their data to new systems, we can see almost to the exact week where ***changes in staff*** involved with data entry occurred. All of sudden ***new coding structures*** were used or notes started to be found in strange places, or worse yet, critical data elements were never entered or transferred from other systems any more.

This could all have been eliminated with:

* Creation of procedural guidelines
* Basic training for new staff
* Reporting checks and balances

**Mistake Two – Never or Seldom Running an NCOA Update**

NCOA is the abbreviation for National Change of Address. This is a simple and economical way to update all of the addresses in your database so they are: Current

1. Usable by the Postal Service
2. In the proper format for bulk mailing discounts

* The average person in the United States changes their address once every seven years. Yes, you read that correctly, if you do not utilize the [NCOA process](https://bloomerang.co/blog/3-reasons-your-nonprofit-should-run-an-ncoa-before-year-end/) then most of your database will not be mail ready in just seven years!
* Depending on the number of times you mail annually, this process should be run once per year, if not quarterly. Just the dollars lost from donations missed  should more than cover the expense of an NCOA in most cases.

**Mistake Three – No Recording of Personal Donor Interactions**

Most nonprofits engaged in fundraising do a good job of recording mailings or email blasts sent as well as entering financial transactions, but many never keep the details of personal donor interactions. Here are a few that are often missed which can lead to lost revenue generating opportunities and little or no building of deep relationships:

1. No details of a phone call with the donor
2. No storage of email conversations
3. No notes from personal visits
4. Not saving a copy of personalized thank you letters

Please think about how far behind other charities working with your donor you are when they have this information over the years and you do not. This can be a real game changer in relationship building and thereby funding your mission.

**Mistake Four – Not Backing Up Your Data and TESTING Your Back-up**

Hopefully, many of you reading this post are already using cloud-based CRM solutions from dedicated suppliers who perform this vital function multiple times a week or day. Pat yourself on your back, you made a wise decision and can now relax confidently about the security of your data!

**Mistake Five – Never Cleaning Up Your Data**

Just like a closet in your home or the car you drive, daily use and misuse can create data errors.   Even without a single data entry mistake over 2-3 years, you will find codes that are no longer being used or the need to add new items.

Just think about what has been added to donor databases in the last 10-15 years by most every nonprofit:

* Email addresses
* Pinterest and Twitter handles
* Facebook and LinkedIn URLs
* Pictures
* Video thank you’s
* Donor advised fund accounts
* Peer to Peer fundraising details
* Communication preferences

If you can eliminate the five biggest mistakes outlined here, you and your team will be headed for better donor relationships, budget cost savings and higher levels of fundraising success!

If you have any tips for other camps to keep their data clean and useful? Let us know on our Facebook Page! <https://www.facebook.com/JCamp180>

*Many thanks to GuideStar USA for this blogpost, which was originally featured on the [GuideStar blog.](http://trust.guidestar.org/2015/08/28/the-7-biggest-mistakes-in-handling-donor-data/)*