Maintaining Family or Individual Records in Your Donor Database

All camps have a choice of how they want to maintain their data in their donor database). The choice has ramifications affecting pledge/gift management, solicitations, general data management/maintenance, reporting, and relationship management. Some camps decide they want to keep families together in one record. Others determine that separating the family into a set of individual records (possibly linked) is the most appropriate for their needs. This document will lay out these choices so that each camp can make an educated decision about how to format their own data.

Family Records

With Family Records, an example family (the Smiths) consisting of a Father, Mother, Son, and Daughter will all be included in one record. It may have the Father or Mother's name in the main name fields, or it could even say "Smith Family" in the First and Last Name fields for mailings. All interactions with this family will be included in this one record.

For example, if all four family members make individual donations to the camp, the four donations will be connected to the family record. The only way to determine which specific family member made each donation is to create a field on the gift record that captures this information. This may make individual solicitations and contact management difficult. However, it makes it very easy to understand a family and all its interactions in total with the camp.

Pros:

- Keeps # of records down which might mean lower monthly database costs, lower mailing costs, etc.
- Simpler to import data if it's already setup that way, and simpler to use because there aren't as many records.
- Records can always start this way but change as your cultivation efforts mature. Family members can be "pulled out" of the family record as they move, start their own family, etc.
- Can be good for schools and camps of younger children because the alumni of the school/camp probably won't have their own address or donations until they are older.
- Many camps already maintain their data as family records in their current systems (i.e., Camper Registration Systems). If this is the case, importing and managing the data as family records in the donor database will require less effort.
- Reporting on a family's history with the camp is simplified.

Cons:

- Even though the number of records would be lower, a larger number of fields would be necessary.
- You could end up with a less robust set of data as you may have a lot of information for the "main" person in the record, but not as much specific detail about the other family members.
- Reporting on individuals and their donations/interactions with the camp is difficult (or even impossible) in this scenario.

Individual Records

With Individual Records, each of these four Smith family members will have their own record in the database. There is no simple way to quickly determine that these people all belong to the same family, although most donor databases have some sort of Link or Relationship functionality that allows a camp to link records together. For example, the Father or Mother could be linked as Head of Household to the rest of the family.

However, it is much cleaner to manage the relationship with each individual. Gifts from an individual, camp history, and other information in the individual's record are associated with only that individual. Therefore, individual solicitation is very simple in this plan.

Pros:

- Keeps # of fields down for each individual, which means records are easier to review.
- You have a full set of data for each member, which helps build a deeper understanding of each person in the database.
- Reporting on individuals and their donations/interactions with the camp is simplified in this scenario.

Cons:

- Even though the number of fields for each individual in the database would be lower, a larger number of records would be necessary, which could result in higher costs and may become more difficult to manage.
- If existing data (in Camper Registration systems, for example) is set up as family records, it will be more difficult to prepare the data for import into the database.
- Similarly, it may take some training/learning to view and work with the data in this form.
- For schools and camps of younger kids this could present additional questions/issues because the alumni of the school/camp probably won't have their own address or donations until they are much older.
- Reporting on a family's history with the camp is more difficult, requiring individuals to be linked together in the database. Even then, some databases don't have a great way to report on a linked family and their history.

Considerations for Determining the Most Appropriate Method for Maintaining Constituent Data:

- How is your data currently constructed? If you currently have individual records in your constituent database, it probably doesn't make sense to merge them all.
  - However, you may consider linking them together for additional reporting capabilities.
- Similarly, if your records are currently in the family record format, it will be a large effort to break the individuals out, and then connect them via links or relationships.
- Are you in a hurry? If so, changing from the way you currently manage your constituent data may be too time consuming.
- If you keep a lot of detail on each individual for solicitation/relationship management, individual records make sense.
- If you often solicit and report by family, family records are a good choice.

Recommendation:

In the best-case scenario, constituents will be tracked at the individual level. As former JCamp 180 Mentor Herb Tobin says, "Families are not alumni; nor are they parents; nor are they donors." However, he adds that appropriate linkages between these constituents must be included in the system as well to allow for a more holistic view of a family's relationship with the camp.

Camps must consider the considerations listed above. For example, if a camp's current data is all at the family level, the effort to transition all the data to the individual must be considered.

Final Thoughts:

You should think of your database as a ball of clay that you can shape and mold into any type of sculpture you like. So, if it makes sense to begin using family records, or whatever method you used in the past, and then slowly make the transition to individual records with all associated links, all of that is possible. Most systems allow you to create *any* field you need, categorize the records using these new fields, and report on the data using custom filters with these new fields as criteria.

Your sculpture will be as good as the planning, time, and effort put into creating and maintaining it. The old adage, "You get out what you put in" is definitely true here. The more time, effort, planning, and most of all, thought, you put into your sculpture, the better it is going to look and function. The better it looks, the more it's going to bring at the auction block (fundraising campaign)!