DATA 2 DONORS

TURNING YOUR DATABASE INTO DEVOTED DONORS

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WELCOME

Welcome to "Data2Donors," which is our short hand for "How to turn your donor **data**base in**to** inspired **donors** to your Camp."

We suggest that you NOT print this PDF. Not only will you save a tree, save some printer ink, but you'll also enjoy easy use of the clickable links that you can access from within this PDF.

In this document you will find all the course materials, readings, resources, course deadlines, and assignments. Each month of the course corresponds to one chapter.

The purpose of Data2Donors is to help you:

- Raise more money
- Engage more alumni and old friends in support of your camp
- Involve volunteers in helping you contact alumni and friends
- Identify old and new friends of your camp who would likely give more generously if asked
- Develop news skills and capacities to raise more money
- Share ideas, learning, and resources with other Jewish Camps

Sound good?

This program involves a lot of effort – it might be "just" 20 hours a month, or it could can easily be much more (or less at some points). Much of the work you'll be doing is behind the scenes and largely invisible to the outside world, the Board, or even your boss. But it is worth it.

There are a few recordings and links to other resources interspersed within this document that will help explain or demonstrate some of the concepts in this program. You are welcome to share these with other people at your Camp, as it might help them to quickly understand the work you are undertaking this year.

To get started, we want to help you understand the potential benefits of taking the course. The first recording below makes the case for why investing time and resources on improving your database will likely pay back handsomely over time. Please watch this, and then share this link with your Board or senior staff to help get them excited too.

In Data2Donors, you'll develop new skills for data management, refine your ability to locate good contact information, and improve your systems to manage volunteers to help with fundraising. Much of your best work in the program will require teamwork. Experience has taught us that you are unlikely to get the most fundraising bang-for-your-buck working alone. At different times you'll need the support and involvement of your camp director, volunteers, and other camp staff. If you find yourself consistently working solo on fundraising or in Data2Donors, Stop! You will not raise as much money.

We are here to help you with this structured and supportive curriculum. We will walk you step-by-step through everything that is required to ramp up your alumni outreach and major donor fundraising efforts. We'll provide you with instructions, deadlines, resources, sample materials, and recommendations. We'll even provide you with webinars where you meet with your peers to overcome your most significant obstacles.

And we will keep you and your organization on track to success.

In return, you will see the impact of your efforts. You'll mark your progress and measure your fundraising improvements. And we'll help you celebrate your accomplishments.

Also – in return for your efforts, the Harold Grinspoon Foundation will pay the cost of donor research services during your involvement in this program, specifically AlumniFinder and WealthEngine's FindWealth8. This is an estimated $5,000 contribution to your camp. Through your participation in this course, we expect to see a 10-fold return on our investment, or more over time.

We are confident that you can raise **$50,000** or more in gifts from the new donors and major donors that you identify and qualify through this program. But if you take to heart the lessons in Data2Donors, and apply them year after year, we expect that you will raise hundreds of thousands of dollars or more from your donors over their lifetimes.

If you maintain relationships with your best donors over time, the total value of their giving over their lifetime is very significant indeed. The best strategies for ensuring long lasting relationships with donors are a combination of good data practices together with meaningful donor stewardship. On the data side, you need to keep good contact information on all your friends throughout their entire living lives. On the donor stewardship side you need to engage your donors to ensure they feel connected, wanted, and proud to see the difference they are making through giving throughout their entire living lives. Data practices supporting donor stewardship are just two components of a robust development effort, but are the focus of this course. Welcome to Data2Donors.

DATA2DONOR EXPECTATIONS AND REWARDS

WHAT IS EXPECTED FROM YOU

- ✓ Attend and actively participate in all Webinars
- ✓ Attend the JCamp 180 Annual Conference
- ✓ Read this document
- ✓ Submit updates on your work each month
- ✓ Work to improve data management at your camp
- ✓ Code all new or updated records throughout the program as D2D
- ✓ Code top 20 major donor prospects identified through this program
- ✓ Provide data for AlumniFinder and WealthEngine
- ✓ Reimport updated data from AlumniFinder and WeatlhEngine into your database
- ✓ Put together a volunteer team to help with alumni outreach
- ✓ Put together a volunteer team to help with major donor fundraising
- ✓ Submit a one-year-out report of fundraising from new or updated contacts AND from your list of 20 top donor prospects, as well as any results from alumni outreach and major donor cultivation
- ✓ Share with other camps your best practices and samples

WHAT YOU WILL GET IN RETURN

- ✓ Free on-line resources
- ✓ Free webinar trainings and support
- ✓ Free AlumniFinder and FindWealth8 review of your entire donor database
- ✓ Free access to FindWealth8 for one year
- ✓ Free consulting help on your major donor campaign and alumni outreach efforts
- ✓ Free tech consulting for your database problems
- ✓ Much improved capacity to raise money

WHAT IS DATA2DONORS?

Data2Donors, or D2D, is just an informal way of saying, "How to turn your **data**base in**to** devoted **donors** to your Camp." This program covers just a small subset of your overall fundraising efforts. This is not a comprehensive fundraising 101 program.

This course is organized in two parts:

> The first half of the course will help you to update and improve the quality of the records in your database. In Part 1 you will also work on the beginning steps of more active alumni outreach efforts.
>
> Part 2 will focus on identifying and qualifying major donor prospects from among your improved data set. You will be working on the beginning steps of major donor prospect outreach, engagement, cultivation, and solicitation.

If words like "identification," "qualification," "cultivation," and "engagement" are a little vague (or just jargon to your ears), please let me know on our webinars, and we'll be happy to explain. There is a list of important fundraising words provided in the glossary at the end of this document. This is a good time to review this list and see how many you know, and how many are unclear to you. Very likely, but the end of this program, you'll be comfortable with all of them.

MONTH BY MONTH OVERVIEW

DATA2DONORS: 6 STEP PROGRAM TO A ROBUST MAJOR DONOR PROSPECT LIST

November: ***"No More Dusty Records," Chapter 1***

Sadly, on average, JCamp 180 camps self-reported that they possess up-to-date contact information on only about 25% of their alumni in their databases. This month will show you how to improve the number (and quality) of records in your donor database. You'll know where to look to find your camp's missing alumni, parents, grandparents, donors, and other constituents. To assist in this process, we'll provide a check-list of action steps to improve your alumni records. This month will also introduce you to the program and the other participating camps in "Data2Donors."

December***: "Get Good Data," Chapter 2***

We will review and confirm that you've completely exhausted all the possible places where your constituent information might be hiding and have moved it into your donor database. Often camps will take this time to merge old or multiple current databases into one. We'll also help you to engage a dedicated group of camp alumni volunteers to help you with personal outreach to help locate names and addresses missing from your database.

January***: "Clean Your Data," Chapter 3***

Now that you have filled in as much missing information as you can in your database, the next step is to clean the data to make it more useful. This will involve updating old contact information, merging duplicate records, segmenting your data, and learning more about your constituents. Many camps discover problems with their data and use this time to fix mistakes. Also, this month we will show you how to prepare your data for submitting to **NCOA, AlumniFinder, and WealthEngine**, as well as how to re-import the data when updated.

February and March***: "Data out / Data in," Chapter 4***

Over the course of the next two months, we will help you export your data and return it with new and very useful information. In February, we will guide you through the process of preparing and exporting your data to **AlumniFinder**, which helps to find new, current addresses for people with outdated mailing addresses. We will guide you through the process of reviewing and importing the enhanced data.

Next we will guide you through the process of preparing and exporting your data to **WealthEngine's FindWealth 8**, which conducts donor background research and provides you with reports on the capacity and inclination of individuals to make charitable contributions, using data from public records. From this you may be able to identify new prospective major donors. Finally, we guide you through the process of updating your database to accept additional data fields and then importing the enhanced data back into your database.

You will receive one-on-one support from Kevin Martone to answer questions and help each of you prepare your data and database to smoothly export and import the data.

April: "***Know your Data to Know your Donors," Chapter 5***

With a more complete database full of updated, segmented constituents, the next step is to learn even more about them. We'll show you how to create more robust prospective major donor profiles. The better you know your constituents, the more likely you will ask them for the right amount of money for the right campaign at the right time.

May: "***Turning Data into Donors," Chapter 6***

In this session we will prepare you to present your top prospect list to your Lay Leadership team. We'll show you how to export your finished donor profiles, share useful information while maintaining donor confidentiality, and move a prospect list to an action plan to meet with donors. We'll review the 5 steps of Major Donor Fundraising and help turn your prospects into major donors. Our intention is to help you invite your best prospects up to camp this summer and then follow-up with them during the coming year to make an ask.

June: "***Do the Celebratory Data Dance…and Ongoing Maintenance," Chapter 7***

All of these efforts are undermined if your database is not maintained consistently on an ongoing basis. Resources must be dedicated to this effort and processes must be agreed upon and documented to ensure the data stays clean and up to date. We'll help you develop plans and procedures for keeping your good donor data clean, up-to-date, and at work to raise more money for your camp.

SCHEDULE AND DEADLINES

Here is the all-important list of requirements. Please print the next two pages for easy reference throughout the course.

	Topic	Requirements
1	Admission into Data2Donors	You will get an email announcement of admission into the program. Please email back your signed work agreement as soon as possible.
2	"Getting to know you" D2D JCamp 180 Conference Face-to-Face Meeting	1. Attend conference 2. Compete assessment of needs in advance 3. Be ready to share 4. Leave with a Camp Buddy
3	"No More Dusty Records" Start unearthing old records and enter them into your database	1. Read Chapter 1 2. Work on database 3. Code all new or updated complete records as D2D (on-going) 4. Report total number of records in database (each month) 5. Prepare your update for the Webinar
4	"Get Good Data" Strive to get data into your system from many different channels, including volunteers	1. Read Chapter 2 2. Work on database 3. Work with volunteers 5. Prepare your update for Webinar

5	"Clean Your Data" Ensure your data in your system is in the best shape possible. Fix problems.	1. Read Chapter 3 2. Work on database 3. Work with volunteers 4. Code D2D and report total number of records 5. Cross-train staff 6. Prepare your update for the Webinar
6	"Data Out for AlumniFinder and Data In" Prepare data and sort (removing addresses you know to be up-to-date) Return the results back into your database Learn about AlumniFinder	1. Read Chapter 4 2. Work on database prep for AlumniFinder 3. Work with volunteers 4. Code D2D and report total number of records 5. Submit data 6. SIGN UP for a time slot with Kevin (kevin@hgf.org) 7. Prepare your update for the Webinar
7	"Data Out for WealthEngine and Data Back In" Prep data and output your data for WealthEngine, then return the results back into your database Learn about WealthEngine and how to use the results	1. Read Chapter 4 cont. 2. Work on database preparation for WealthEngine 3. Work with volunteers 4. Code D2D and report total # of records 5. Submit Data 6. SIGN UP for a time slot with Kevin (kevin@hgf.org) 7. Prepare your update for Webinar

8	"Know your Data to Know your Donors" Learn the skills involved in identifying and qualifying your major donor prospects	1. Read Chapter 5 2. Review results from WealthEngine and preparatory lists 3. Work with major donor volunteers 4. Code top 20 major donor prospects for D2D.MD (and report) 5. Create Donor Profile template 6. Prepare your update for Webinar
9	"Turning Data into Donors" Learn the skills in connecting with and cultivating your major donor prospects	1. Read Chapter 6 2. Work with major donor volunteers 3. Create or update Campaign Case Statement 4. Invite prospects to camp, set up discovery meetings 5. Prepare your update for the Webinar
10	"Do the Celebratory Data Dance" Learn how to keep and maintain the high quality of your data over time	1. Read Chapter 7 2. Review results from WealthEngine and prepare lists 3. Work with Major Donor volunteers 4. Code top 20 major donor prospects for D2D.MD 5. Create Donor Profiles 6. Prepare your update for the Webinar
11	"Reporting the results"	Answer these questions: How many new contacts have been added to your database? How much have you raised from these new contacts? How much have you raised from your top 20 major donor prospects? What other tangible benefits did you gain from participation in Data2Donors? What recommendations do you have for the future of the Data2Donors program?

In the beginning of the course, we need to track the number of records you are likely to be submitting to AlumniFinder and WealthEngine. We are also interested in monitoring the number of new contacts you are adding to your records. Please email Kevin to schedule your one-on-one meetings with him in February and March (kevin@hgf.org).

Please use the email list of participants in D2D to share materials, samples, and resources with one another. We learn so much from one-another, and everyone appreciates seeing the things you've creating to help with Alumni Outreach, engagement, volunteer management, and fundraising.

"GETTING TO KNOW YOU": ATTENDING THE JCAMP 180 CONFERENCE

At least one person responsible for participating in the Data2Donors program is expected to attend the D2D workshop at the JCamp 180 Annual Conference, which is scheduled within the regular scheduled conference session.

The annual conference is free, and JCamp 180 can help you offset the cost of travel and lodging to attend the conference for up to two members of your staff.

At the workshop in November, you can expect a quick overview of the program, hear from some participants from last year, and have time to get to know the other camps in the program. Every camp will leave with a camp "buddy" by the end of the workshop.

Here is what you need to review prior to coming to this workshop (these are taken from your application to the program – so review what you already submitted):

NO MORE DUSTY RECORDS

CHAPTER OVERVIEW

WHY "NO MORE DUSTY RECORDS"?

The goal for this Chapter/month is to help you input as many names and contact information for as many of Camp's Alumni and friends as you can. Decades old paper records are at risk of being lost forever. A name with incomplete contact information isn't very helpful, but it is better than nothing. Even a database can get "dusty."

Too often Camp is just too busy to focus on tackling this project head on. This chapter covers why this work is so critical. We will provide a list of many ways you can start to make improvements. Get those old records out of storage and start inputting!

WHAT WILL BE COVERED IN THIS CHAPTER?

The action steps you'll be asked to implement in this chapter focus first on assessing the condition of your database, and then on inputting as many names from old records as possible, even those without good contact information. The next two chapters will discuss ways to locate good addresses and cleanup information inside your database. This is the longest chapter in the course but builds a foundation for everything that follows.

Chapter Outline

1.1 Background Growing the total number of contacts in your database

1.1.2 How Jewish Camp Databases have evolved over time

1.2.0 Your Data Base As It Is Today

1.2.1 Making an assessment of the current condition of your database

1.2.2 Reviewing common database problems

1.2.3 Learning to create reports from your database

1.2.4 Some principles of basic fundraising best practices

1.3.0 Establishing systems for finding lost Alumni and acquiring names

1.3.1 Internal Efforts:

1.3.2 Coding new contacts acquired as D2D

1.3.3 Ideas on where to look for names and old lists

1.3.4 Tips on transferring old databases into your system

1.3.5 Putting old Camp photos to work for you

1.3.6 Using the “Do Not Mail” function

1.3.7 External Efforts:

1.3.8 On-line Form on your website

1.3.9 Phone calls to the office

1.3.10 Reminders added to print materials

1.3.11 Using Social Media

1.3.12 One-by-One adding people to your database

1.3.13 Involving the Camp Staff

1.1 BACKGROUND

GROWING THE TOTAL NUMBER OF CONTACTS IN YOUR DATABASE

Ready to get to work?

The first step in this program is to ensure that all your camp friends, families, fans, and past campers are represented in your donor database. Why is this so important?

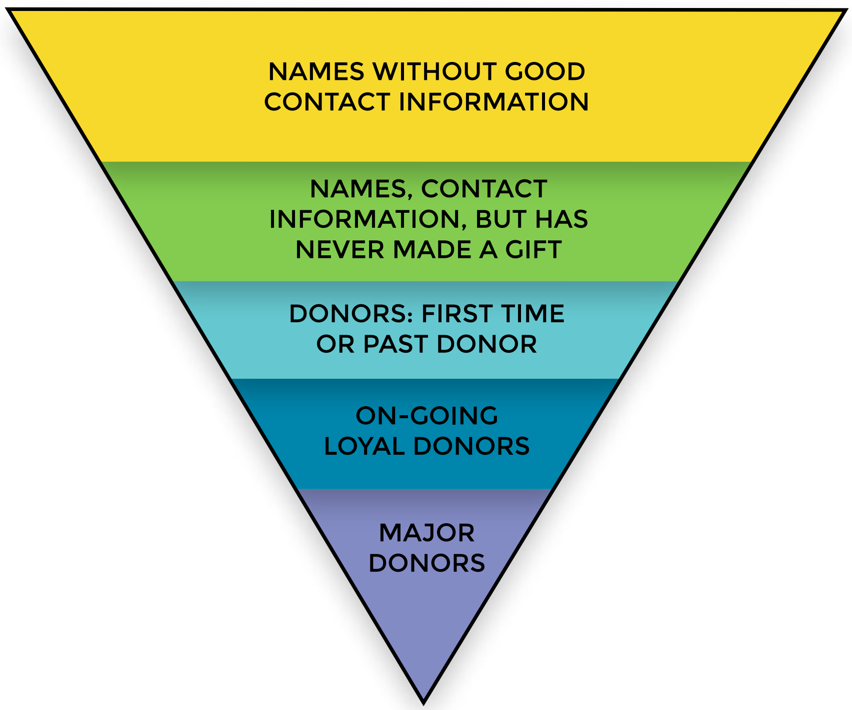
It is important to remember that **everyone** who comes into contact with your outstanding

organization has the potential to become a devoted supporter -- should you choose to communicate with them.

On the flip side, people are unlikely to support your camp if you ignore them year after year, which happens if they are not in your database. And it is highly unlikely that someone with no connection to or contact with your organization will become a loyal and devoted donor.

Thus your task is to fill your database with as many names of people who do know your organization through some channel. From that wide base of names, you’ll begin the work of engagement and finding your potential major donors.

Think of your database as a funnel:



A healthy fundraising program works to expand the total number of donors each year, and increase the total dollars raised. That means embarking on every effort to increase the total number of good contacts.

From this broad and growing base of support, a healthy fundraising program will make every effort to tell people why their support makes a difference, and will make sure to ask for a first time gift, a second gift, a monthly gift, or a gift pledged over several years.

From among the many people who are willing to support you with smaller donations, a healthy fundraising program takes the time to identify the few people among their supporters who have the capacity and interest to make a significantly larger donation.

A larger base of support will have a larger pool of potential major donors.

Having many names of past campers, with an approximate year(s) that they attended, in your database with **no other information** *is better then leaving it out of your system. Why? Because it gives you some historical information upon which to find and reconnect with them.*

1.1.2 HOW JEWISH CAMP DATABASES HAVE EVOLVED OVER TIME

In our experience working with Jewish camps, most think of their donor database as the place to keep up-to-date information on the people who have already made a contribution to the organization. In addition to donations made to general program and scholarship support, this list in the database might also include donations made through a Gala or special fundraising event. All too often it's a limited list.

Then there might be a major anniversary celebration with a big push to get back in touch with alumni to invite them to attend. Then the database might grow a little more to include some "not yet" donors. The list from camp's anniversary five years ago might only be a long list of names with now outdated email addresses.

Then, perhaps, someone might make an effort to transfer records from the enrollment database into the donor database, so that current families can be contacted to support the camp. But this transfer of information might be done inconsistently from year to year, if at all.

It's still a limited list.

This approach might have been logical in the days when camps only needed to send out an annual appeal letter to a few hundred people, and only tried to raise money for capital projects in a crisis, like when the dining hall burned to the ground. But times are different now.

The need for camperships is greater then ever. It is, in fact, historically at an all time high for Jewish Camps. Sadly, the need isn't going to go away even if the economy continues to improve. In addition, many camps have ambitious multi-phased master facilities plans that involve raising tens of millions of dollars. Finally, now camps are realizing that they should start to build an endowment to maintain the high quality of their programs and facilities. Scholarship, Capital and Endowment fundraising require an all-together different approach to building and sustaining your database.

To meet the demand of your camp families, fulfill your vision for an outstanding campsite, and build an enduring endowment for the future – **you need to be in touch with your entire and extensive camp community now and forever more**.

The only way to accomplish this is to have **a robust database of your entire community** of camp friends, families, supporters, and alumni.

1.2 YOUR DATABASE AS IT IS TODAY

1.2.1 ASSESS AND DOCUMENT THE CURRENT CONDITION OF YOUR DATABASE

Your first step in this program will be to assess the current condition of your database and to also identify sources for all possible missing records. See the text box for some ideas about how to assess the strengths and weaknesses of your data.

TAKE A CLOSE LOOK AT YOUR DATABASE – GET CURIOUS. YOU MIGHT ASK YOURSELF . . . .

- How many records are there?
- How many records have good addresses?
- Is my data fully segmented, and if so, how reliably is the segmentation?
- How far back do my records go?
- When was this database set up, and how was information entered in at first?
- How are alumni years assigned in my database?
- Can I tell who are my best donors?
- Can I tell which are alumni parents with kids attending camp today?
- How are my major donors flagged?
- Are there any notes about my major donors in my database?
- Can I figure out who are our loyal donors, how many, their average number of gifts, the average gift amount, and their total giving over time?
- Is it possible to understand what inspires donor loyalty by looking at the data?
- Can I tell how many lapsed donors there are right now?
- Could I generate a list of married couples who met at camp?

I want you to take the time now to reflect and write up an assessment of the state of your data.

Take the time to describe the strengths of the current data and the problem areas so that anyone can understand it. The written report does not need to be more than two pages in length. Call this report, "The State-of-the-Data Report for (Your) Camp"

You should share your assessment with others. Why? Because a problematic database is largely invisible to everyone at Camp -- but you!

Board members may declare at a committee meeting, "let's engage more alumni at our reunion!" and never realize the primary problem to engaging alumni is that you lack enough good contact names in the database. By sharing your assessment now, you will help to make an invisible problem visible to people who have the authority to allocate more time, money, and human resources to address the problems.

Next, strategize whom you should share this report with inside your organization. It might be your Development Committee, Camp Director, and/or Board of Directors. In addition, we would welcome the chance to read your report.

This report is the starting point from which you'll be making many improvements, and the better you define the starting point, the more you'll be able to celebrate as you accomplish your goals.

1.2.2 REVIEWING COMMON DATABASE PROBLEMS

We have some experience helping camps overcome common database problems. Here are some common issues to look out for as you review and clean up your database:

- Yes, you need to manage more than one database at camp in most cases – one to manage campers and camper registration and another for tracking your alumni, donors, and donations. However, don't track any other contact information in other systems. That is, you should have no spreadsheets where contact information is maintained – all information should be able to be pulled from your databases when needed.

- If you have **records with only names**, don't delete them! Your volunteers might be able to find contact information for them. Until then, simply mark them as "Do Not Mail" with Do Not Mail Reason = "Bad Address" so they aren't included in your mailing list until you find an address for them.

- If you have records where you KNOW the **addresses are bad**, don't delete them! The old address might help your volunteers (or data services) to find the updated address. In the meantime, simply mark them as "Do Not Mail" with Do Not Mail Reason = "Bad Address" so they aren't included in your mailing list until you find a current address for them.

- **Merge duplicates.** You should only have one record for each person in your donor database. That will allow you to see a full picture of that person – gifts, history at camp, etc. It will also ensure you don't accidentally send anyone more than one mailing.

- **Segment your data.** Categorize all of your data consistently so you can pull lists of specific groups: alumni, parents, grandparents, people who met their spouse at camp, etc. Consider what segments you might want to send specific communications to and make sure you track everyone in that group consistently.

- Make sure all **States** are entered as official State or Province abbreviations. And never put Country in the State field! Filter your data and find all the instances of *Canada* and *Israel* in the State field and move them to the Country field.

- Similarly, check all of your **fields** – is the right type of data in each field? For example, are email addresses in the correct fields? Phone numbers? Anything that is incorrect should be moved in the database.

For all of these data issues, be sure to fix them IN THE DATABASE! So often we see camps fix these errors in a spreadsheet pulled from the database for a mailing that needs to go out. Then the errors continue to live in the database…and they'll simply have to be fixed again next year. Always clean up the data in the database so that you never have to make the same change again!

Here are some questions you might ponder as you create your "State-of-your-Data" report:

- Why is the database important?

- How is its current limitations hampering your efforts to fundraise and to engage alumni and friends?

- What is strong about your database? In what ways is it in good shape?

- Where are the current weaknesses or known problems? Can you tell how much need to be fixed or cleaned-up?

- What complaints do you, or the staff, have about your database and its functions?

- Do you know if it the complaints stem from the quality of the data, the type of database you are using, the lack of skills to use the data, or the limitations of the database in general?

- How much staff time is devoted to the care and feeding of the database? Is it enough? Is the staff well-trained in how to use the data to advance fundraising?

- Are there currently discussions among your staff about moving to a new database system in the near future? What is the thinking? And is there a plan? How far along in the process are you in making a move?

Test your database to see if you can answer these kinds of questions:

- How many records are in the database?
- How many records have good addresses?
- How many records have good emails? Phone numbers?
- How many alumni are recorded in your database? Out of how many possible alumni?
- How much did you raise from your top 20 donors last year?
- How much did you raise from everyone else last year?
- What was the average gift amount, from everyone other then than top 20 donors?
- How many total donations did you receive last year?
- How typical was last year compared to past years?
- How many years are recording in your database? Can you show total fundraising results going back 5 years, 10 years, 20 years?

In conclusion: What must be done that will make a difference? If action is taken, what will be different in the future?

1.2.3 LEARNING TO CREATE REPORTS FROM YOUR DATABASE

To answer the above questions, you will need to learn to pull (or create) reports from your donor database. Pulling useful reports will help you to ask and answer interesting and important questions. Such as, "It's end of October: Please pull a report of every donor who gave last year, but hasn't yet made a gift this year so we can be sure to encourage them to give again before the end of the year."

In my experience working with camps, most camps are poorly trained in the art of pulling good reports from your data and then using those reports to raise more money.

There are some basic reports that can be very powerful in advancing your fundraising efforts that you should learn now, if you don't already know them. For the example above, the report I described is called a LYBUNT report: donors who gave **l**ast **y**ear **b**ut **u**nfortunately have **n**ot made a gift yet **t**his year. There is also the related SYBUNT report for donors who are lapsed in their giving. SYBUNT: they gave in **s**ome **y**ears, but **u**nfortunately **n**ot **t**his year).

Contact your database vendor for more support to learn new skills in pulling reports. Most will have programs either free or for a fee that can show you step-by-step how to do these things.

Make this an important priority for you in this course.

1.2.4. SOME PRINCIPLES OF BASIC FUNDRAISING BEST PRACTICES

Some basic fundraising best practices in the non-profit sector are built upon your ability to have data systems in place and regular habits to use the database for fundraising. Review the list below to help you further test the current condition of your donate data systems.

Here are some Fundraising 101 basic best practices based on using your data:

- **Recognize gifts quickly and correctly**. Don't get people's name or the amount of their gift wrong on a thank-you letter.

- When they are making a donation, ask them how they want to be addressed, and then use the name they give you. For example, the credit card name might be "Irving" but he only likes to be called "Irv." *This requires two steps. One is to ask the donor at the time of donation, and the second is to enter your data into your database correctly every time you receive a donation, and without delay*. Remember: "Thank before you Bank!"

- If someone gave once, but hasn't given since, **engage them and encourage them to give again.** *This means pulling SYBUNT reports, assessing what motivated the first gift, and then contacting your SYBUNTS.*

- Go out of your way to warmly welcome someone who has made **a first-time gift.** Go above and beyond expectations to create a delightful donor experience. *Track the number of first-time gifts each year, and the conversion rate to second-time gifts. Try to improve this number each year.*

- **Celebrate loyal donors** who have donated more than once. The lifetime value of loyal donors is really, really important and represents the second most cost-effective way to raise more money.* *This requires tracking giving over time, and sharing your knowledge (and deep gratitude) of their giving habits with your donors.*

  * If you didn't know, Major Gift Fundraising is the most cost-effective way to raise money, and Donor Retention is the second most-cost effective.

You know that typical Jewish Camp tag line, "Friends for Life?" **Start behaving like a life-long friend to all your donors.**

- If someone gave at the end of the year (December), **don't wait** until December of the next year to engage him or her. Radio silence is deadly to healthy fundraising. *This means developing the habit of pulling year-to-date reports and LYBUNT reports and planning on contacting your donors mid-year with items such as newsletters, invitations to camp, even a spring appeal letter for urgent scholarship needs.*

How many of these and other fundraising basic habits do you have in place in your annual fundraising cycle?

Now you should have concluded your data base assessment and overview of it's condition. We hope you will share your report with us as soon as it is done.

1.3 ESTABLISHING SYSTEMS FOR FINDING LOST ALUMNI AND ACQUIRING GOOD CONTACT INFORMATION

Adding new "old friends" to your database

Now that you've completed your assessment of the current condition of your database, it's time to switch into overdrive!

This will be your biggest push to add new names and contact information for as many members of your camp community members as possible. We want you to vastly grow the number of records in your possession.

This is going to be huge. But the potential reward is equally massive.

Internal and External Efforts

This effort is going to have internal and an external components to it. The internal components are those efforts to find lost alumni that you can do yourself from within the camp office without the public knowing you are doing this work. This includes digging out old boxes of historical records and adding names to your database from on event registration lists. It will include updating systems internally.

The external components involve those efforts that involve other people helping you to locate lost alumni or obtain up-dated contact information. This includes creating a website location where people can voluntarily leave you their updated information.

Every effort, both internal and external, may feel like small baby steps towards a robust database full of good contact information, but accumulatively, it will make a difference.

1.3.2 CODING NEW CONTACTS ACQUIRED AS D2D

But first, a requirement: We are requiring you to code each new entry you make in your system as "D2D" and then report on your fundraising success from these new records. Here's how:

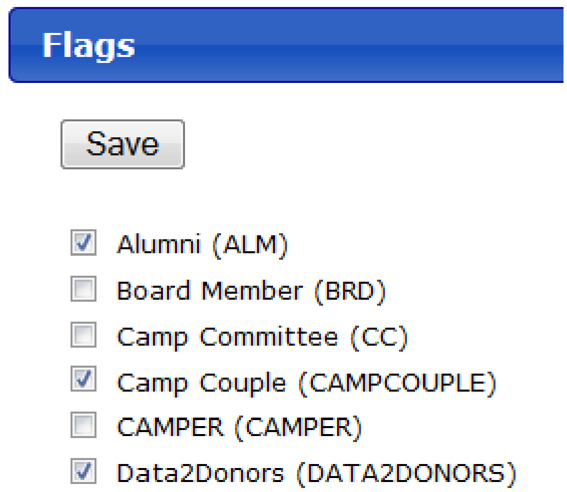
Data2Donors - Tracking New Names and Addresses

As part of the Data2Donors program, camps will enter new names and updated addresses into their databases. Records that are updated during the course of this program should be tracked consistently so they can be segmented. Every database has functionality to easily categorize records so that they can be segmented for reporting and communications. DonorPerfect Online (DPO) uses Flags (see image below); other systems use Tags or other features to categorize records in the database.

For every new name or updated address added to the database during Data2Donors, it's critical that you track them consistently. This will allow you to:

1) Ensure you send a welcome packet to every constituent you reconnect with during this process.
2) Allow you to report on the success of your work to engage these individuals as a result of Data2Donors.

You can track them as "Data2Donors," "D2D" or in any other way that will allow you to easily pull a list of these new records.



Questions? Contact Kevin.

An added benefit of coding these new contacts is being able to engage and involve these new old friends, and track your success with them over time.

1.3.3 IDEAS ON WHERE TO LOOK FOR NAMES AND OLD LISTS

Where to Look for Names, Names, and More Names!

The next step is to take an inventory of all the possible locations of names, contact information, and lists of people who have a connection to camp but who are missing from your donor database.

Dusty boxes sitting in storage filled with old camper files will do you no good ten years from now if they stay boxed up. Molding camp yearbooks with photos from the 1970's and 1980's are useless unless you unearth them from the basement. Unusable records sitting in an outdated database from the 1990's will be unreadable in the future. Become an archeologist and unearth these gems of records today and enter the names of past campers, past staff, and past friends into your current database.

Capture as much information from old paper records before they are lost in a fire or flood, succumb to mold, or are recycled by someone well intentioned!

It is okay to start to collect this list of names in an excel Spread Sheet and then download a batch of names and information into your database, as long as you add a step to de-duplicate your data.

Where might you look to find friends of camp to add to your database?

- **Paper records** – Do you have historical camper/staff/parent rosters? Old filing cabinets around the camp office?
- **Old paper donor records**
- **Yearbooks**
- **Camp photos with captions**
- **Camp storage**
- **Names at the camp itself**
  - *Names of cabins*
  - *Bricks with names*
  - *Donor recognition walls*
  - *CIT plaques for projects they built*
  - Graffiti, names with year at camp – why not?
- **Transferred records from camper registration software into Donor Database**
- **Old databases that haven't been linked to your current database**
- **Lists of past Board members from minutes**
- **Lists of past staff from years ago**
- **Old lists of event attendees:**
  - *Major anniversaries*
  - *Special events*
  - *Reunions*
  - *Gatherings that required registration*

  - *House parties*
  - *It is best to be selective with lists from Golf Outings and Honoree Galas, and such. These lists may contain names of people who may never become repeat donors.*

- **Old legal documents or historical information –** such as the list of the founding Board members at the time of incorporation.
- **Brainstorm other places** to find old records that might be missing from your database. Please share your ideas with us! We are really interested to know where you unearthed other names . . . .

Note: You are looking for everyone in your camp community, which might include: alumni, past staff, past and current parents and family members, past donors, past and current Lay Leaders and volunteers, businesses with a connection to the camp, local community members with an interest in the camp – anyone who might have a reason to stand in support of your organization. Alumni are not the only people with a motivation to support the camp if asked.

1.3.4 TIPS ON TRANSFERRING OLD DATABASES INTO YOUR SYSTEM

Data Transferring

Some camps in this program may find that they need to transfer records from an older database system into their current donor database. Or you need to transfer names from your camper registration database into your donor database. This can quickly get you many more records and jumpstart your efforts to get more names into your system.

Make this a priority project. In most cases, the process will require the following:

1) Decide what data needs to be pulled from your source database – does it need to be all records? Only records added since last year? Only people who have turned 18 this past year?
2) Export the required data from your source database into a spreadsheet.
3) Clean up the spreadsheet to ensure it matches the format your donor database requires. Ensure each record has the appropriate categorization (Flags? Tags? Categories?) in your spreadsheet so that records can be segmented once in the donor database.
4) Back up your donor database. Always backup the data before importing data. (If need be, check with your vendor about how to make a backup of your database.)

5) Import the spreadsheet into your donor database.

6) Check your imported data – was it imported correctly? Is all the information available?

7) Dedupe your data. Every person should only have one record in your donor database. Your database should have functionality to merge duplicate data – check with your vendor.

Some camps get frustrated with the slow and sometimes complicated process of merging databases. If you are transferring records from your Camper Registration system, I recommend that you write down your process in detail with step by step instructions, and then make this an annual task. This way, the task will be simple and not time-consuming from now on. A year from now you might not remember the steps unless you write it down. Also – if you write it down you can train someone else to do the task for you.

1.3.5 PUTTING OLD CAMP PHOTOS TO WORK FOR YOU

Once you FIND camps' old photos and records, there are many, many cool things you can do to use this material to engage your old friends. Many camps use old photos for "Throwback Thursday" on Facebook, and use materials to excite alumni to return to camp for reunions.

But how might you capture and store all the wonderful materials you just unearthed?

First you have to find these great photos. If your camp has historically created yearbooks, they will contain tons of photos that were already determined to be some of the best. But what if you are missing yearbooks or other historical documentation? Ask your audience! URJ Camp Harlam went through this process recently. They realized there were missing yearbooks from many years in their history. So they sent out an email to their alumni asking for specific yearbooks...and received an incredible response. Then you can scan the images and data from these yearbooks and return them to their owner (with a note of thanks!).

You may also have boxes full of slides and photos somewhere at camp or in your winter office. If you find boxes full of photos, they need to be digitized to use online. Staff or volunteers can scan them manually, but this is very time-consuming.

Your other option is to use one of many services to digitize these photos for you in bulk. There may be a local vendor who can provide this service. Tip: Check Groupon – they often provide digitization services at deep discounts; some are local vendors, others require you to mail your photos and slides to the vendor.

There are also services located internationally that can digitize photos and slides very inexpensively. One such service some camps have used successfully is ScanCafe. You have to send your precious photos via mail to use a service like this, but they have received good reviews re: their service.

If you are transferring information from your registration database into your donor database, come up with rules and a system for transferring this information once a year.

What about capturing text from old documents and yearbooks?

You might even be able to use OCR (Optical Character Recognition) to take scanned images of old documents and turn them into editable documents (rather than manually retyping all of this information. This will help you speed up the process of transferring names in yearbooks into donor records. Check your scanner to determine if it includes OCR functionality. If you have additional questions about OCR, contact Kevin at kevin@hgf.org.

1.3.6 USING THE "DO NOT MAIL" FUNCTION

Do not send mail to people with OLD or Bad Addresses.

When you send a Camp mailing out in the mail, you get a number of pieces returned as "Undeliverable" because of bad addresses, and that information needs to be updated in your database. Why keep spending money to send mail to the wrong address?

If you keep track of records in your database that contain old addresses, you can focus on identifying and updating them over time.

Therefore, when you find out that an address is incorrect, don't just delete the address or the record from your database. The reason is that if you keep an old address, you might be able to use a system like AlumniFinder or the NCOA (National Change of Address) database to lookup a current address. But you don't want to send mail to the wrong address either. So you need to mark it as a bad address so you don't include them on mailing lists until their address is updated.

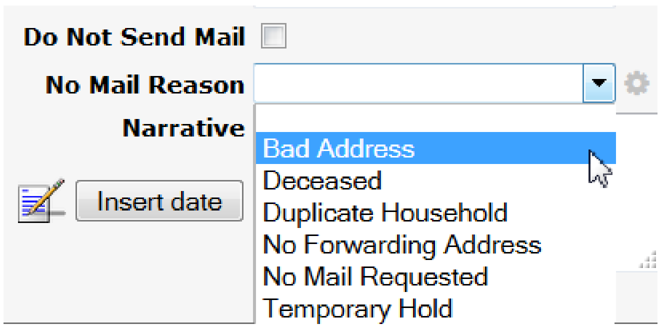
How should you mark records that have bad addresses?

Every donor database has functionality to mark records "Do Not Mail." There could be many reasons for marking a record "Do Not Mail": the person asked not to receive mailings any longer; the person is now deceased; the address is not correct; etc.

Most donor databases have both the "Do Not Mail" field AND a "Do Not Mail Reason" field. If you discover an address is incorrect, mark the record as "Do Not Mail" – this is usually a checkbox in the system. Then also select "Bad Address" as the "Do Not Mail Reason." "Do Not Mail Reason" is usually a dropdown field that allows you to select from a specific set of options – if your system doesn't have "Bad Address" as an option in this field, contact Kevin Martone (kevin@hgf.org) or your database vendor for help adding the option to the system.

If you have a long list of names to enter, one time-saving method for getting them into the database is to use an Excel spreadsheet, import the results, and then dedupe your list.

Here is what the fields look like in DonorPerfect Online (DPO):



Once you start marking records as "Do Not Mail," **be sure to always exclude them when you export names and addresses from your system to send mailings**. Otherwise, these bad addresses will still be included in your mailing!

1.3.7 EXTERNAL EFFORTS TO UPDATE OLD CONTACT INFORMATION

Let's shift now to the efforts to input names and contact information that involves the external communication or the efforts of other people. Ask Your Friends to Help! You are going to set up systems to ask old friends of the camp to share their updated contact information with you.

Some people will freely volunteer their information in order to stay in touch with the camp. These are the best, most wonderful people in the whole, wide world from your point of view. You should jump for joy and give them Camp's enthusiastic love any time someone contacts you to say, "Here is my new address. I went to camp in the '80s."

So we strongly encourage you to make it ridiculously easy for people to leave you their contact information:

1.3.8 ON-LINE FORM ON YOUR WEBSITE

Your website MUST have an online form that alumni can fill out to provide you with updated contact information. A standard email should be sent out to everyone who signs up thanking them for their information and telling them what they can expect. Don't have a form? You can create a simple, free form using Google Forms to include on your website.

1.3.9 PHONE CALLS TO THE OFFICE

Be sure that anyone calling you with their contact information can easily leave a message or talk to a person who will swoon with happiness to take their information, and treat them with the warmth of an old friend. For that is what they are.

1.3.10 REMINDERS IN PRINT MATERIALS

Your return envelope included with any appeal letter or print newsletter should invite people to send you their updated information and personal news, even if they do not donate. Your newsletters and emails should encourage people to stay in touch and tell you where they are, and what they are doing, and invite them to update their information. Scan your print materials and external communications for places you can include a message about staying in touch.

1.3.11 USING SOCIAL MEDIA

Your camp likely has hundreds or even thousands of people connecting on Facebook, Twitter, LinkedIn, and other social media sites around shared connection to your camp. Use these channels to engage, build community, and collect contact information. Compare names on your camp's Facebook page to names in your database.

Post on Facebook that your website is now set up to collect updated contact information so that everyone can be sure to hear about the next big anniversary event, reunion, or other camp news. Promote the fact that you want to be back in touch with old friends.

Your "long-lost alumni" maybe "liking" you on Facebook, or their friends are. Recall that the largest growing segment of Facebook users is older people, not campers or staff-aged people – just the sort of people you are looking for! Make sure that anyone connected to you through social media is also represented in your database.

You can use Facebook to message individuals to ask them for current contact information, as long as you are friendly and chatty about it. If you are investing in a social media strategy for your camp, then by all means, use it to contact your alumni. It's okay to ask a long-lost friend for help in updating their contact information.

Some of you might be asking if it is worth the effort to individually contact people to ask for their updated information. For example, you might write a Facebook message such as, "Hi Jill. I see you commented on the camp's goofy photos of yesteryear. I was thrilled. By the way, might you be one of the campers in the picture? If so, was your maiden name back then Gold? That's the only Jill I know of . . . if not I would love to hear about your connection to the camp! We'd also be thrilled to update your contact information so we can share with you news of future reunions at the camp."

> "Hello. I love you. Won't you tell me your name?"
> – The Doors

This level of engagement on Facebook requires a large degree of vigilance in following your social media sites. It may not seem realistic right now to have the staff time and resource dedicated to tend your social media sites. Ask yourself: What if Jill reconnects with camp and then sends her son or daughter to camp? Or becomes an annual donor to camp? Was the staff investment in outreach worth it? On the flip slide, what might be the risk if you don't tend your social media? Some camps have suffered from poor reviews posted on-line and in social media sites by very upset parents that spread significantly before camp staff where able to respond – weeks later! That can feel too little too late, and significantly damage the camp's reputation.

1.3.12 ONE-BY-ONE – ADDING PEOPLE TO YOUR DATABASE

One-by-one personalized acquisition of information about your lost friends is slow, labor-intensive, time-consuming – and also highly effective. You are far more likely to inspire a donation from someone who has been personally, professionally, and politely encouraged to reconnect with the camp. That person has taken an active step by giving you their contact information. If you use that contact information to quickly provide them with a warm welcome, AND if you ask them for support in a meaningful way – odds are good that you'll get a first-time gift. If you thank them quickly and correctly, stay in touch, and ask again, you'll encourage their loyal giving. That is a good thing. The lifetime value of just ONE new loyal donor will pay for the time it takes to do one-on-one acquisition of new potential donors.

How many loyal donors do you have right now? What if you had double that number? What strategies would you need to employ to double the number of loyal donors to the camp?

1.3.13 INVOLVING THE CAMP STAFF

Acquiring Good Contact Information: Whose job is it anyway?

Please take a moment to reflect:

- What if you are not the person in charge of social media for camp?
- What if you are not the person in charge of the newsletter?
- What if you don't print the return envelopes?
- What if you don't answer the phone?

Do you see where I'm going with these questions? "It's not my job" isn't going to help your camp raise more money.

Take some time to review all your options for finding old records and capturing updated information. Then present these options to your camps' staff team, explaining why it is important to collect updated information on as many people as possible. Involve the entire staff in this team effort.

For example, the controller at one camp pointed out that she noticed that an increasing number of grandparents are paying for summer camp. These names and addresses were not in the donor database – but WOW – what a missed opportunity to engage these loving, caring, committed grandparents! That is the kind of gem you are likely to find in a staff meeting on this topic.

PS. Make a note to check and see if grandparents are represented in your database and see if you track which grandparents have been paying for camp in your system.

DO THIS

Get names from old records
into your database

THINK THIS

As it will lead you to your
loyal, loving fans

“GET GOOD DATA”

CHAPTER OVERVIEW

WHY “GET GOOD DATA”?

The goal of this month’s chapter is improve the quality of the data you’ve now entered from old sources. Obviously you want to obtain good contact information for everyone in your database, and the process requires a lot of consistent and dedicated effort. Your information may be incomplete (e.g., the list of camper names from the summer of 1988 might just be a list of names with their parent’s old addresses, if that). You’ll need the help of volunteers who were at camp during that period to help you locate your lost alumni and then see if you can get back in touch. You’ll start an Alumni Outreach campaign to request and get the good data you seek.

You’ll need to do everything in your power to update all your contacts with up-to-date information before submitting it to WealthEngine in the next few months. WealthEngine can only provide you with results for names with current contact information. Therefore, this chapter covers different strategies for finding as many current addresses as possible.

WHAT WILL BE COVERED IN THIS CHAPTER?

The action steps you’ll be asked to implement in this chapter include creating a volunteer committee to help with Alumni Outreach. You’ll work with this team to reach out to their camp friends for contact information, to create a “Welcome back” packet, and to review list of names with bad or no contact information. In addition, you’ll create a marketing campaign to request Alumni information.

CHAPTER OUTLINE

2.1 CREATING A VOLUNTEER ALUMNI OUTREACH COMMITTEE

PERSON-TO-PERSON ACQUISITION – VOLUNTEERS ROCK

Your next major task is to gather a small group of volunteers from a broad range of age groups. They are going to spend the next few months helping you to personally reach out to old friends and invite them to share updated contact information with the camp. They are going to feed you their findings. And they are going to help you plan out and implement the camp's enthusiastic "welcome back" messages.

This group is key to help you to get good data into your database, and then do something with it.

In your application to Data2Donors you prepared a list of possible volunteers who you identified might help you. Now is the time to contact them and put them to work.

2.1.2. SAMPLE VOLUNTEER JOB DESCRIPTION

Here is a sample description you can use to encourage their volunteer efforts:

Camp Sunshine

Reconnecting to camp alumni and old friends

Thank you so much for volunteering your time and efforts – it is invaluable and deeply appreciated! Your help at this time will make a huge difference for the camp. We have a very unique opportunity to work with the Harold Grinspoon Foundation to vastly improve our outreach to Camp Sunshine alumni and old friends. But we need your help to be successful in this program.

I need your help between now and February in reaching out to your network of friends from camp and making sure we have their up-to-date contact information. You, and the other volunteers in this group, should expect to dedicate at least 10 or more hours of volunteer help between now and February.

In exchange for your help, we can offer you support and encouragement, free meals when we meet together, a fun time with a great group of volunteers, and the knowledge that you've made a difference for the Camp you love.

The three primary tasks for this group will be:

1. Provide good contact information for camp families and friends you know from your own network. I'm hoping you can each provide around 10 or more new addresses that we don't currently have in our database.

2. Review lists of entries that are missing contact information and see if you recognize any of the names. If you can, try and see if you are able to get back in touch with any of them. We hope we might be able to track down good contact information so we can invite them to reunions and such.

3. Help plan for a welcome packet or some other nice way to reconnect with people once we do get or find good contact information. Just having good contact information isn't very helpful if we don't reconnect with people.

There may be more work we would like to accomplish together, and this group may want to keep working past February, but for the purposes of this program, this is the help I need right now.

Here is a check-list of things you can do individually and as a team to make a difference:

As a Team:

- ✓ Schedule at least three meetings between now and February
- ✓ Get to know more about what the camp is already doing for alumni outreach
- ✓ Review lists of names without good contact information, and see if you know anyone, or can help track down current information
- ✓ Help review plans for alumni engagement in the coming year or two
- ✓ Decide if this group will continue working together after February

On your own:

- ✓ Bring at least 5 (ideally 10) current names, addresses, and contact information of past campers or camper families from among your circle of friends
- ✓ Try to use your friendship circles, networks, Google, Linked In, or other social media to locate lost alumni, encouraging them to be in touch again
- ✓ Volunteer to write personal notes to “found” alumni as assigned
- ✓ Represent your camp at other Jewish events, and see if you can meet other camp alumni

Pulling together a volunteer group that is representative of different ages of people helps ensure that you have a broad coverage of different eras from the camp. You can reassure them that they will not be asking for money. Most people, if asked and supported, will dive in and make an impact. Many people really enjoy this work.

2.1.3 VOLUNTEER MANAGEMENT TIPS

Guiding a group of volunteers to work hard requires nurturing, structure, and support. You may find that some volunteers agree to help but then procrastinate on tasks that they agreed to do, and never get them done. (This is just human nature: we're all very busy.) Your job is to support this team to be successful by:

- ✓ Recruiting a representative group of volunteers who are well connected to camp friends
- ✓ Sharing with them the expectations and timeframe for volunteering
- ✓ Explaining the importance of the work and what difference it will make
- ✓ Thanking them for thinking about it. (*Donors aren't the only people who need stewardship!*)
- ✓ Setting up 3 or more structured meeting times in advance for the committee to meet
- ✓ Making meetings wonderful and fun to participate. Meetings are best done in person. Think food, a nice location, gratitude, gifts!
- ✓ Being clear about the goals of each meeting
- ✓ Thanking everyone after each meeting, and reminding them (a week or so in advance) of the work they agreed to do between meetings
- ✓ Contacting each volunteer between meetings to ask what they have done to date (so you can report on the progress, and check in with them on the work they are or are not doing)
- ✓ **Sending regular updates on the progress achieved between meetings**
- ✓ (Gently) nagging and thanking, nagging and thanking, then nagging and thanking again
- ✓ Celebrating your volunteers at the end both personally and publicly! (Asking them about the experience and what they learned can be useful material for camp newsletters.)

Motivation, structure, support, reporting, and recognition are the secret ingredients of a successful volunteer team.

Motivation = Tell your volunteers why they should be motivated to volunteer. Answer these questions: *Why volunteer? What difference will it make? What is in it for me? Will I gain anything from the experience, such as make new friends, hang out with old friends, or gain new skills?*

Structure = Tell your volunteers your expectations to time and tasks. Answer these questions: *When do we meet, what will we do? What is expected of me? When and where will we meet?*

Support = Tell your volunteers what they can expect from you. Answer these questions: *Will you be providing me with support? Will I be able to be successful at this task? Will you provide reminders, clarity about tasks, timelines? Will it be easy and enjoyable to attend meetings?*

Reporting = Tell your volunteers how they are doing. Provide them with information, such as: *The progress the team is making and what is happening with the work they are doing so that they know it is making a difference. Report on how many members of the committee have followed-up and followed through. Reporting helps prevent slacking.*

Recognition = Thank you volunteers. More than you think is required. Some ways to thank your volunteers include: *Thank your cards to your volunteers. Providing them with meals for their troubles. Giving them gifts of camp T-shirts. Personally letting them know you appreciate them. Providing a word of thanks to them in your print newsletter or other public space.*

If you are friendly and organized, and you manage your volunteer team in these ways, your volunteers will likely have a fantastic time and may be more open to help you in many other ways in the future.

SHARE YOUR EXPERIENCE: We want to learn from your experience with your volunteer team. Please share what you've done, what worked and what didn't work as you engage volunteers to help you locate good contact information.

2.2 CREATING "WELCOME BACK" STRATEGIES AND MATERIALS

Another job of your volunteer group might be to help you develop a "welcome back" plan for all the people they reconnect with over the next few months.

There are different paths to collect up-to-date contact information. You should plan ahead on how to best to welcome them back to camp.

Why is it important to welcome people as soon as you think you've found a contact that was missing from your lists?

1. Because it communicates that you are interested in them and re-establishes the connection with the camp **before you ask for money**.
2. You should test the address to see if it is, in fact, good.
3. If done right, being thoughtfully and personally welcomed back will surprise and delight your old camp friends. Other non-profits often fall short in making people feel *wanted and welcomed*.
4. If you let people who care about the camp know that the camp cares about them, it will be far easier to inspire that person to make a first time gift to camp.
5. Only people who make a first gift to camp can become loyal donors to camp over time.
6. New good addresses added to your database will become old and dusty unless you use them to engage your constituents. If you don't contact them now, it is as if you never did all this work in the first place.

Here is the order of events:

1	You advertise that you are looking for lost friends or volunteers help you find old friends
2	People provide you with their contact information or their friends provided you with contact information
3	You thank them SO much for contacting you, and welcome them or you let them know you found them and invite them back
4	You invite them to stand in support of Camp with a donation
5	You have acquired a new donor!

2.2.1 WELCOMING BACK YOUR NEW, GOOD CONTACTS

Here are some tips for creating and placing "welcome back" messages:

- ✓ Write a warm and friendly email that goes to anyone who submits his or her updated information on-line. Also, edit the "Thank You" page that pops up when people hit the "submit" button on-line so that it is also warm and friendly and fun too!
- ✓ Make sure it is clear what they can expect from the camp now that they are in touch, **and be sure to fulfill that promise.** For example, you might offer to send the camp's newsletters in the mail, provide information about reunions and retreats, or invitations to visiting day or special events, etc.
- ✓ Record a "welcome" video, and send the link to it to new your contacts.
- ✓ Remind people that camp baby bibs, T-shirts, and other gifts are available for order.
- ✓ Look at samples from other camps and other non-profits.
- ✓ What other ways might you create a delightful, simple, fun, and very much camp-like welcome to someone who has been out of touch? Share your ideas with us!
- ✓ Test your approach to see if it works at inspiring your new contacts. Use the first 5 new people as a test, and ask them what they think and what suggestions they might have for you.
- ✓ A welcome back letter doesn't need to include a request for support, but it would benefit from a return envelope being included. Camp Solomon Schechter sent a "welcome back" letter with a return envelope, and where very excited that it generated a $500 donation within a week of the mailing.

2.3 LAUNCHING A MARKETING CAMPAIGN "SEEKING LOST ALUMNI AND FRIENDS"

The next step is to create a marketing campaign and a communication plan to tell the world that you are actively looking for long lost friends. Last month you may have updated your website to receive updated contact information, and now you need to draw people to this page and voluntarily provide you with their information. Otherwise, it will likely never be used.

2.3.1 MOTIVATING PEOPLE TO VOLUNTARILY PROVIDE YOU WITH THEIR CONTACT INFORMATION

If you just advertise in newsletters, emails, and social media that you are seeking people's contact information, you may notice sluggish results. You'll get better results if you motivate people to take action. NOW!

What will inspire someone to respond? Think about your "Ask" and the "Offer."

The "Ask" is what you are asking people to do right now, i.e., you are asking people to provide you with current contact information. You will tell them why they should do this, what difference it makes, why it is important, and what is in it for them. The "Offer" is what they get in return for taking action.

Then think about making it "urgent," so someone will act now while they are thinking about it, and not put it off. Urgency is a feeling. Therefore you can construct (admittedly) artificial deadlines and intensity that will drive people to take action.

2.3.2 THE URGENT ASK AND OFFER:

Here are some examples:

Ask: Please go to our website and share your updated contact information.

Offer: If we have your contact information, we would love to invite you to reunions, keep you connected to the spirit of this special place, tell you of special events you might be interested in now or in the future, such as family camp, and most importantly, to help you stay connected to your old friends. Because the friends you make at camp can be friends for life.

Why Now? "Our 50th anniversary is coming up! Don't miss it!" "Only 20 tickets left in our Song Leader in the City event." "First 10 people to respond will get the newest camp t-shirt." "Tuesday is the deadline to enter the lottery to be 'Camp Director for a Day' this summer."

Other "Asks" might be:

- Request for stories about camp
- Request for referrals of kids who might be interested in camp
- Request that they come back for anniversary events
- Request for a donation

Other "Offers" might be:

- Monthly e-newsletter
- Announcements of reunions and anniversary events
- A drawing for a camp t-shirt
- Information on how to order camp stuff on-line

- Recognition wall for couples who met at camp
- Camp baby bib for births
- Discount for alumni families that register kids
- Discounts on rental of camp facilities for private events such as weddings
- Pre-invitations to family camp and retreats before it is open to the public
- A warm and happy feeling of being connected to camp again
- The hope that old friends will be back in touch
- Memories

Be sure that your "Ask" and your "Offer" are clear each time. We suggest that you develop a communication plan for this effort, and map out the messages, the timing, the placement of the messages, who is going to manage this effort, and the budget for the effort (if you are providing give-a-ways). If your organization has never created a communication plan like this, we might suggest you enroll in our program JTEC, which covers the intersection of communications and technology (please see our website for more information about JTEC).

SHARE YOUR EXPERIENCE: We want to learn from your experience promoting your request for contact information. Please share what you've done, what worked and what didn't work as you engage your community to help you locate good contact information.

Another tip from Camp Seneca Lake

"A link was placed on the camp's webpage asking alumni to enter their contact information. Every couple of days the link is reposted on Facebook hoping more people will see it. We even Boosted the FB post for $10 to reach several more thousand people."

2.3.3 INVOLVING PEOPLE WHO MIGHT KNOW OTHER PEOPLE

Spread the word that you are looking for updated contact information:

- ✓ Ask your Board members to share with you their network of camp friends. Then personally follow-up with one or two of the most connected individuals. Ask to meet with them one-on-one to go through their contact lists. In our experience, if you make the request to the whole Board you’ll receive only silence. Thus the need for follow-up.

✓ Ask your most active alumni (and other constituents such as well connected parents) if they are in touch with other alumni. Request their help collecting updated contact information. Send them the link on the website where people can input their updated information. Reward and recognize these wonderful volunteers with a gift, such as a camp jacket.

✓ Ask the Camp Director, or other connected senior staff member if you can look through their collection of Facebook friends. If you see a large number of alumni names among their list of friends, request that they repost your “Asks” and “Offers” for contact information, so that requests are not just posted on the camp’s Facebook page.

2.3.4 USING SOCIAL MEDIA

In just five years time social media has transformed our work with Jewish Camp Alumni outreach. We recall that in November 2009 we ran a workshop on Facebook for Jewish Overnight Camps, and some in the audience asked if it was “even appropriate to have a camp Facebook page, since Summer Camp is about ‘unplugging’?” We were asked how was it going to be managed by the limited number of camp staff, especially if no one was experienced in using social media. If that was our reality just five years ago, can you image how approaches to using social media might be different five years from now? We point this out because your organization is going to need to keep adapting to new approaches to communicating with your constituents of different ages and stages of life. Print and mail will always be a backbone of your work, but using social media is now part of your body of work too.

Here are some suggestions from Camps on how they implemented social media for Alumni outreach:

> “We have used three different Facebook pages associated with camp to collect names. We then compared them to our (database) information. Anyone who was not in our files was sent a Facebook message asking for their contact information.”
>
> -A tip from **Camp Seneca Lake**

A True Love Story from Tamarack Camp

"One thing that has been successful for us has been developing social media campaigns around finding alumni. Two summers ago, we came up with the Love Story Contest, where we asked our alumni couples who met at camp to submit their stories on Facebook. The couple with the most "likes," would win prizes that included personalized camp t-shirts and a date at camp. In addition to the couple providing their story, they also were asked to submit their contact information. From this campaign we either found or updated contact info for 44 couples as well as several names from people who liked and posted comments to their posts."

What else might you do with Facebook? Post photos and other camp memorabilia on Facebook, asking alumni to tag themselves and people they know. Then follow up with a FB message, asking for contact information if none is provided.

Please share with us your ideas and successful approaches.

2.4 OTHER PLACES TO ASK FOR UPDATED CONTACT INFORMATION

Now take some time to think comprehensively about different places you can ask for and get good contact information from your community of friends. Scan these ideas, add your own, and prioritize your approach.

2.4.1 USING CAMPER REGISTRATION AND OTHER APPLICATIONS

Independent schools learned long ago that if they ask for information in an application for admission, they will get more detailed, comprehensive, and useful information voluntarily from parents than at any other time. This includes the names and ages of siblings, names and addresses of grandparents, and background information on the jobs and workplaces of the parents, and more – all of which can help YOU in your efforts as well.

Wherever someone is filling out information for you, you have his or her attention. Use this time together to find out if they have a deeper connection to camp, and if so, if they want to stay in touch. Here are some forms you might review to see if you can obtain more information:

- New Camp Registration
- Summer Staff Application
- On-line donation page on your website (recall that you need to balance easy with

your desire to obtain more information)

- Family Camp registration
- Camp Reunion or Anniversary event registration
- Camp On-line Auctions

For example, you might ask: "Are you an alumni of Camp?" "If not, how did you hear about Camp Sunshine?" "Would you like to receive our twice a year newsletters?"

If you update these forms, you'll also need to update your internal administration practices to collect this information and add it to your donor database. For example, if you find out that the Camp nurse is an alum from the 1980s from her staff application, and she is married now, you might have her in your database under her maiden name. It needs to be someone's job in the office to review the answers in the updated applications and update the database.

As you make plans to update applications to collect good contact information, also make plans for systems to move that information into your database on an on-going basis, not just as a one-time event. Write down the plan and document the process, review it with your staff team, implement it, review a year from now, and make adjustments as needed.

When you come up with your protocol, please share it with us. We would love to learn from you.

2.5 REVIEWING LIST OF NAMES WITH NO CONTACT INFORMATION

You can create lists of names in your database without good contact information and use these lists to help you locate good contact information. Bellow are some approaches to getting friends, staff, and volunteers to help you generate good contact information.

2.5.1 HAVING YOUR VOLUNTEER COMMITTEE REVIEW LISTS OF NAMES

Many Eyeballs on Your Lists is a Good Thing: Your Volunteer Committee will also be involved in looking over lists of names to see if they can help find updated contact information for you and give you some context for reconnecting with them.

You should prepare lists of names for your committee to review. There are three things you are asking your volunteers to provide you as they review a list with you:

1. Do you recognize any of these names?

2. Can you help us find good addresses for any of these people?
3. What else can you tell us about these people that might help us reconnect?

In order to help your volunteers help you, prepare your lists with some clues included – such as: year (or decade) at camp; old address if you have one; the connection they might have had to camp, such as past camper, past staff member, or unknown. Obviously, the better shape your data segments are, the better you will be able to pull lists that are informative.

2.5.2 TIPS ON FACILITATING A GROUP OF VOLUNTEERS AND STAFF TO REVIEW LISTS OF NAMES

Once you have pulled some lists of "missing friends," it is time to organize time to sit down and review them. When you schedule a meeting of your volunteers and/or staff to review lists of names without good contact information, you'll want to establish the purpose and motivation of the meeting. Let people know that you are trying to reconnect with old friends of camp and you need help finding up-to-date information and contact information. Remind them of the benefit of doing this work, such as inviting them back to reunions and anniversary events, help with recruitment, and information about events such as Family Camp.

If senior staff seems too busy to help, you might remind them that reviewing this list is a requirement of Data2Donors.

People will be more motivated to help if you are clear about the purpose and benefit of dedicating their time.

When you get to the meeting, you will need to remind your volunteers (and yourself) not to worry if the results of the list review are less then wonderful. Even one new lead is better than none!

In my experience with list reviews, I find it helpful to have two people helping during the meeting. One person shares the lists and keeps the group on task. The other person works on a computer and with the print-outs to capture notes from the conversation.

There seems to be a natural flow to these meetings. After your introduction and instructions, it is just too quiet and most people seem overwhelmed by the long list of names. Then some discussion starts to emerge that seems helpful, and it is usually difficult to capture all the notes. Next, someone gets stuck on discussing some detail, just spends too much time on one name, or gets distracted about discussing something else you should do to try to find more names. This is the distracted part of the meeting, which is totally expected. You'll need to gently nudge the group back to the list and the task at hand. You can say, "that is a great idea that I am writing down and we will discuss later, but we're required to look over these names by Data2Donors, and we have 5 more pages to look at and just 20 more minutes." I also advise that you end the work at an appointed time and not drag out the process too long.

Hint: You should also review lists with senior staff at camp. The process is the same, and the results *will augment what your volunteers are able to produce.*

After the meeting is over, you will place the information you've gathered back into your database. In the past, we've seen camps that have effectively tapped volunteers to reach out to lost Alumni in advance of a big Camp anniversary or reunion event with great success. But unfortunately, this information was not added back into the database. What a loss. Make updating your data part of your camp staff's DNA.

2.5.3 CHECK-LIST FOR VOLUNTEER TO USE WHEN REVIEWING A LIST

Here is a handout you could use with your volunteers:

Data2Donors Check-list

For volunteers looking over a long list of names with old or no addresses . . . .

So you've volunteered to look over a list of old names for camp – what kind of information is useful? Just about anything that comes to mind . . .

- ✓ Do I know any of these people?
- ✓ How do I know them?
- ✓ Is that their correct/proper name? Example: Irv's full name is Irving.
- ✓ Didn't they get divorced? They are both remarried now.
- ✓ I thought she moved? I think she lives in Florida now.
- ✓ Ohhh – I'm Facebook friends with her – I'll send her a note!
- ✓ I think he might have been on staff in the 1980's at the waterfront. Gee, was he cute.
- ✓ My sister-in-law might remember these people; she was at camp 5 years after me. Should I ask her?
- ✓ They came to reunion last year, and brought their twins with them.
- ✓ I haven't thought about him in years – I wonder if Bill knows where he is now?
- ✓ We really should get back in touch with him – I know he loved camp so much and he and his brother came on a scholarship. He has done really well in business. I bet he would give back if asked.
- ✓ I don't know any of these names – sorry.

More specifically – we are looking for

- ✓ Good, current contact information (address, phone number, email)
- ✓ Full and correctly spelled names
- ✓ Current family members and relationships
- ✓ Reconnection and renewed contact

Also – if there is someone here you know, and you would like to be the person to contact them and reconnect, that would be fantastic. Thank you!

2.6 COLLECTING GOOD ADDRESSES FROM RETURNED LETTERS

Another tried-and-true method for getting good addresses into your database is to monitor the letters that are returned to you from your annual appeal mailings. Those “change of address” notices on yellow stickers from the Postal Service are pure gold to us fundraisers.

You can use your next end-of-year appeal letter to test out your list to see if you can find updated addresses. (Be sure to resend the appeal with the corrected address!)

> “I just have to share, we sent out our Annual Campaign Mailing this past week and are now getting back the ones that have bad addresses or the ones that have moved and have forwarding addresses....I don’t think I have ever been more excited to receive a change of address!!!”
>
> - **Herzl Camp**

CLEAN YOUR DATA

CHAPTER OVERVIEW

WHY "CLEAN YOUR DATA"?

Now that you have done everything within your power to get as much data as possible into your database, and you've worked hard to ensure that as much of that data is current and up-to-date, you are now ready for the next important step: cleaning up your data and preparing it for AlumniFinder and Wealth Engine. The goal of this month's chapter is to review the additional steps you will need to do to cleanup common data problems and prepare your clean data for donor research.

WHAT WILL BE COVERED IN THIS CHAPTER?

The action steps you'll be asked to implement in this chapter include finishing the segmentation of your data, correcting the full names of your contacts, removing duplicates, and correcting State and Country entries. You should also review your "state of your data" report and make document your progress to date.

CHAPTER OUTLINE

3.1 Data Clean-up

3.1.1 Segmentation

3.1.2 Clean up and systemize your data Segmentation

3.2 Full Names: Clean up Names as Best You Can

3.3 What about maiden names?

3.4 Remove Duplicates (De-Duping)

3.5 Correcting State and Country

3.6 Celebrate your progress and assess your remaining goals

3.1 DATA CLEANUP

After imputing as much data as possible into your donor database, and improving the quality of your data, you must now cleanup your data and prepare it for AlumniFinder and Wealth Engine. You only have one shot at using these tools (while we are footing the bill for you). As you know, the best quality data going into WealthEngine will provide you with the best results.

Even more important than having clean data for AlumniFinder and WealthEngine is having clean data for all the work you do to fundraise for Camp. The truth is the more good contacts you have in your database, the better you can fundraise from your entire community.

AlumniFinder is going to check names and addresses you provide against 10+ years of change of address information from the post office and give you updated information. AlumniFinder works only if you have a name with an address, therefore any records with just a name and without an address cannot be submitted. It also works best if you use full names, such as Irving instead of Irv, or William instead of Bill.

You will provide us with as many U.S. records with full names and current addresses as possible to be entered into WealthEngine. WealthEngine will try to identify the best people with wealth capacity and philanthropic interests. With this information in hand, we'll move onto the work of identifying as many good prospective major donors as possible.

So now, your last step is to clean your data. Here are some typical things you can do to cleanup and prep your data:

3.1.1 SEGMENTATION

The single most powerful thing you can do for the health of your fundraising efforts is to effectively and correctly segment your data. Segmented data is data that defines people into categories, such as Past Camper, Parent, Past Staff, Current Board Member, or Past Board Member. If you have well-defined categories, you can then personalize your fundraising efforts. The alumni of your camp can get a different letter than past staff members or current parents of young campers. Segmenting allows us to talk to people who care about camp as specific people with a personal connection to the organization, and not as a massive lump of people who you hope will donate.

Segmenting isn't hard to do in most databases, but, over time, it can become inconsistent, applied differently by different people, making your segmentations untrustworthy. If your data is only "sort-of segmented", it won't help you raise more money. Therefore this task requires you attention now.

3.1.2 CLEAN UP AND SYSTEMIZE YOUR DATA SEGMENTATION

Some suggested segmentations – You'll need to come up with your own list.

- Current camper
- Past campers (alumni): include last year attended or year of HS graduation, or birthdate
- Current staff and year(s) worked at camp
- Past staff and year(s) worked at camp
- Current parent (and children)
- Current parent who is also an alumnus
- Past parent (and children and years at camp)
- Alumnus past parent
- Couples who met at camp
- Grandparent
- Past grandparent (and children and years)
- Board Member
- Past Board member (and years)
- Supporter
- Other categories
    - Vendors
    - Local government contacts, local emergency contacts
    - Day schools, JCC, etc.
    - Federation contacts, foundation contacts for grants
    - Other area businesses (for sponsorships or auction donations)

Tip: Think about what reports you may want to run and what different eNewsletters and/or letters you might want to share with different segments of your database. That will help you think about what segments or categories to create.

There are conflicting needs in managing your segments – on the one hand, you want the set of segments to be simple to use and maintain and on the other hand you want to be able to easily divide your list into meaningful groups.

The general wisdom is: **err on the side of simplicity**. Easy-to-manage set of segments will more likely be used for pulling reports, are less likely to confuse future staff entering in information, and will be kept in better shape over time.

Train everyone to enter in segments consistently and correctly. If every record isn't categorized consistently, your segments will never be complete.

3.2 FULL NAMES: CLEAN UP NAMES AS BEST YOU CAN

Look at your data. Everyone at camp may call Steven "Sudsey" for his summer spent as the camp's dishwasher, and you will be sure that all letters sent to him greet him as Sudsey, but AlumniFinder and WealthEngine will be no help to you unless you use legal and full names. Make some time to review your entire data set to ensure that "First Name" is listed as "Steve" and "Salutation" is listed as "Sudsey."

3.3 WHAT ABOUT MAIDEN NAMES?

Your donor database should have a field to allow you to track Maiden names. If not, it can be added to your system (check with your donor database vendor).

AlumniFinder will not be much help to you in finding married names. You'll need the help of volunteers to track down this information for you.

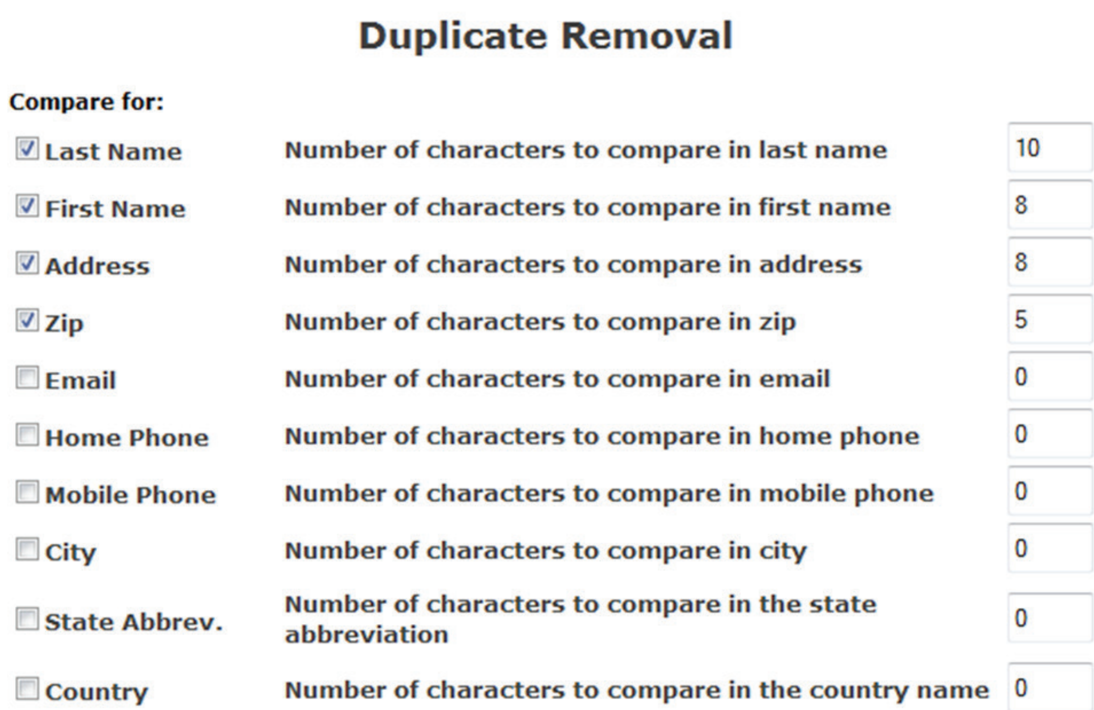
Make sure you share nicknames and maiden names in the files you share with your volunteers – they may not even realize that Sudsey's real name is Steven!

3.4 REMOVE DUPLICATES (DEDUPING)

Da-da-da De-DOOOP!

De-duping is a ridiculous sounding word for the process of removing duplicate records. It is a process you likely already know how to do, but if you don't, we are happy to teach you. (Or to be more direct, if you don't know how to dedupe your records, stop reading and send Kevin (kevin@hgf.org) an email right now. This is a really important and useful data management skill to have.)

Many donor database systems have a deduping function built into it. For example, this is a screenshot of the Duplicate Removal function in DonorPerfect Online (DPO):



Duplicate Removal

Compare for:

☑ Last Name	Number of characters to compare in last name	10
☑ First Name	Number of characters to compare in first name	8
☑ Address	Number of characters to compare in address	8
☑ Zip	Number of characters to compare in zip	5
☐ Email	Number of characters to compare in email	0
☐ Home Phone	Number of characters to compare in home phone	0
☐ Mobile Phone	Number of characters to compare in mobile phone	0
☐ City	Number of characters to compare in city	0
☐ State Abbrev.	Number of characters to compare in the state abbreviation	0
☐ Country	Number of characters to compare in the country name	0

Duplicate records come about for any number of reasons. For example, when a gift is received from a repeat donor, but the data entry person creates a completely new record; or when all parents from one summer at camp are imported into the database. No matter how the duplicates were created they must be addressed and corrected regularly. Ideally you'll set aside time for deduping once each quarter. You MUST dedupe your database each time you are ready to send out a mailing. Since you should be sending your end-of-year appeal letter out in November or December, this is the time to review your list and to correct duplicates.

For our purposes in Data2Donors, you must de-dupe your list before submitting it to be run through AlumniFinder, since we pay a fee per record – there is no reason to pay twice for the same record.

3.5 CORRECTING STATE AND COUNTRY

The post office prefers you use the designated State abbreviations in your mailings (MA instead of Mass. or Massachusetts, for example). And services like NCOA, AlumniFinder, and WealthEngine will ONLY read the designated State abbreviations. Be sure all addresses have the correct state designations.

Similarly, many camps' databases have a few records with the country listed in the state field. This will cause errors when uploading to these services. Be sure Canada and Israel, for example, are moved to the Country field in your database.

3.6 CELEBRATE YOUR PROGRESS, ASSESS YOUR REMAINING GOALS

Congratulations. You have finished your biggest push ever to get your data into tip-top shape.

By this point in the course you should have entered in as much information into you database as possible, done everything you can to update that information to ensure it is current, and reviewed your data to correct mistakes and problems.

You should be proud of all your hard work. You can be pleased as punch that you've tackled an unpleasant job that has been neglected by so many for so long (or if your camp had such systems, to take them to the next level). It's gratifying to know that you know have processes in place that will ensure the on-going acquisition of quality data from now on.

Take some time right now to re-read your "state of the data" report you created at the start of this course, back in Chapter One. It's time to write an update that reflects the work you've completed, the work that is in-progress, and the work that is still left undone but still needs to be addressed in your database systems. Submit this information to your boss, Fundraising Committee, or Board of Directors, whomever you feel should know what you've accomplished. Recall that your efforts are largely invisible to everyone unless you communicate what you've done.

For the data work that is still not yet finished, write what you think might need to happen next – even if it is out of your control. For example, if you still need professional development to learn how to pull reports from the database but haven't had the time to do it yet, or the budget to pay for the on-line courses offered by your vendor, offer a timeframe in which you want do this work and request the funds.

Once you've written your report, please share it with us. We would love to read it, and celebrate the progress you've made!

DATA OUT AND DATA IN

CHAPTER OVERVIEW

WHY "DATA OUT AND DATA IN?"

The goal for this Chapter is to help you prepare to export your clean data for both AlumniFinder and WealthEngine, and then return the enhanced results back into your data base.

It's a multistep process –

1. You submit your clean data to us to be run through AlumniFinder in the hopes of capturing additional updated addresses you might still be missing.
2. We return the results to you to select the correct results and integrate back into your database.
3. You submit your up-to-date final list of names and addresses to us to be run through WealthEngine to identify potential major donors from among your community of friends and supporters.
4. We return the results to you to select the correct results and integrate back into your database.

In this chapter you will also be introduced to the basics of using FindWealth8. You will have free access to FindWealth8 for one year, and we want you to take full advantage of the program to help advance your fundraising efforts.

CHAPTER OUTLINE

4.1 ALUMNIFINDER

You have been working for months now to capture as many names and addresses as possible, and to clean-up and prepare your data to the best of your ability. Still, there are some addresses out of date and there is one last process we can employ to try to find good, current addresses for you. We will pay for your data to be run through AlumniFinder.

4.1.1 WHAT IS ALUMNIFINDER?

AlumniFinder is a service that will quickly and easily check the names and addresses of all of your contacts in your database in one batch to be sure they are up-to-date, thus reducing your returned mail volume and expenses. In addition, WealthEngine needs to have up-to-date addresses to work. Therefore the higher the percentage of good addresses you have in your database, the better you will be able to raise money from both your base of support AND from your major donors.

AlumniFinder is used by most large non-profits. In fact, 98% of U.S. colleges and universities, and the top 10 non-profits use AlumniFinder – making it the leading locate-and-research tool available today.

In our experience, AlumniFinder is likely to return to you only a small number of new good addresses from your data. It is unlikely to wow you with the results. This is why it is so important that you continue to work actively with volunteers to help locate your old friends. Every new good contact in your database is very important. Before spending resources on WealthEngine, we want to be sure we've done all we can to get every possible current address in place.

4.1.2 DATA PREPARATION FOR ALUMNIFINDER

The following information will help you prepare your data adequately for sending to AlumniFinder. Review the information below and go into your database to clean up the data to the best of your ability. Do NOT simply fix the data in an exported spreadsheet – if you clean up the data in your database, you won't have to fix it again!

Please have your data ready for AlumniFinder and submitted to d2d@hgf.org no later than 4 PM ET Tuesday, February 10, 2015.

If you have any questions about preparing your data for AlumniFinder, please email Kevin

Martone at kevin@hgf.org.

Data Preparation before Exporting to AlumniFinder

- Remove names with no address information
- Remove names from outside the US and Canada
- Remove names if you KNOW the addresses are good (This is important, since we pay per record, there is no need to run good and current addresses. However, if you aren't 100% sure, leave the record in. so we can make sure it is checked by AlumniFinder.
- Make sure all States are entered as official State or Province abbreviations
- Check all columns – is the correct type of data in that column for all records? i.e., emails only in the email field?
- Make sure you have your camp name in the camp field for every record you submit

Verify that the ID field you have in the spreadsheet is the official ID in your database, which will allow us to re-import the data based on that ID. Every record in your database has a unique identifier that will allow data imported to be connected to that record – this is the ID you need to include with every record.

4.1.3 DATA STRUCTURE FOR SUBMITTING DATA TO ALUMNIFINDER

You can find the data structure required for submitting to AlumniFinder below. You can also download a spreadsheet with the format here:

http://www.jcamp180.org/uploadDocs/3/AlumniFinder_data_upload_format.xlsx

Internal ID	Salutation	First Name	Last Name	Suffix	Address 1	Address 2	City	State	Zip	Social Security #	Date of Birth	Past or Current Employer	Email	Camp	Phone #
100	Mr.	Kevin	Martone		67 Hunt Street	Suite 100	100	MA	01001			Harold Grinspoon Foundation	kevin@ hgf.org	Camp Smile	

Note: What if you don't have Social Security number or date of birth in your database? Leave these entries blank, but keep them in this format. AlumniFinder will need your data in this exact format.

Note about DOB: If you don't currently collect this information on camper registration information, I would recommend that you start. Keeping a DOB together with someone's name will make it easier to keep track of someone over their lifetime, even if the camper changes her name as an adult, or if they have a common name.

4.1.4 YOU'VE RECEIVED YOUR DATA FROM ALUMNIFINDER . . . NOW WHAT?

We will have your AlumniFinder data returned to you. This data will need to be reimported into your database; you will use your Unique IDs to update the appropriate records in your database. If you don't know how to import data into your database, reach out to your database's vendor for help. Kevin Martone can also provide support.

Want a detailed description of the AlumniFinder data and what it means? This short webinar from last year's Data2Donors program featured an AlumniFinder representative describing the service: http://vimeo.com/84176994

Your AlumniFinder data will be categorized as follows in the VRNMX field:

V = Address found is the most recent and verified for this person.

R = Address found is the most recent, usually most current, but not verified with current phone number

N = Needs human intuition. Possible typos in address or name fields - refer to online system to verify.

M = Recent move confirmed by USPS as current address (NCOA - National Change Of Address)

X = Not enough information submitted for matching.

Addresses marked with a V, R, or M should be imported into your database – AlumniFinder has verified those addresses to the best of its ability and you can trust the data. Addresses with an N should be reviewed manually before importing into your database. Addresses marked with an X should be ignored in your import. So sort your data by this VRNMX field and only import those marked V, R, or M.

For our detailed recommendations of what to do with the data returned from AlumniFinder, review Appendix C.

4.1.5 WHAT DATA (FIELDS) WILL YOU IMPORT?

The exact data you decide to import into your database is up to you; every organization must decide what will be most effective for them. The key is to pull in just enough data to help you make informed decisions.

Our base recommendation is to import the following data:

- Address fields (for records marked with V, R, or M as described above)

You *might* also want to import the following (although you should check some records for accuracy):

- Phone
- Date of Birth
- Deceased field

Finally, there is a field called "Deceased" that provides a date that a person has died. You should probably sort the spreadsheet by that field and review anyone who has a "Deceased" date. If you can verify the information, these constituents should be marked as "deceased" as appropriate in your database. If they are single, you can simply mark them as Deceased and Do Not Mail. If they are part of a couple and their partner is still alive, you may just want to make a note of the person's death and ensure the Salutation and Label names on the record no longer mention the deceased.

4.2 WEALTHENGINE

With the next step in this course we will significantly shift our focus from curating your data to major donor fundraising. The purpose of WealthEngine is to help you quickly identify people in your community with significant resources and ability to support your organization. The rest of the chapters in this book will help you to put that information to work.

4.2.1 WHAT IS WEATHENGINE AND FINDWEALTH8?

WealthEngine is a service for non-profits that has a tool called FindWealth8 that will help you to identify and cultivate the right target donors for fundraising. FindWealth8 makes it easier and faster to systematically understand your audience – their wealth, disposable income, interests, philanthropic associations, household and demographic data, and much more. FindWealth8 gives you detailed, reliable information in seconds that can help you to quickly identify donors with both capacity and philanthropic habits from among your entire database.

In addition, JCamp 180 will pay for you to have access to FindWealth8 for one year. With this contract, you will be able run single reports on all new names added to your database in the coming year. You'll be able to use the service to prepare for individual meetings, or when creating in-depth donor profiles.

WealthEngine can help you to:

- Identify donors with demonstrated affinity for organizations like yours
- Establish targeted fundraising programs
- Cultivate relationships with donors and prospects
- Determine the right "ask" amount
- Garner maximum support for your organization or cause.

4.2.2 DATA PREPARATION FOR WEALTHENGINE

The following information will help you prepare your data adequately for sending to WealthEngine. Review the information below and go into your database to clean up the data to the best of your ability. Do NOT simply fix the data in an exported spreadsheet – if you clean up the data in your database, you won't have to fix it again!

Note that the more detail you provide (Business name, Spouse information, etc.), the more accurate and complete the data you receive from WealthEngine will be. Use this opportunity to enhance your data to the best of your ability.

Please have your data ready for WealthEngine and submitted to d2d@hgf.org.

If you have any questions about preparing your data for AlumniFinder, please email Kevin Martone at kevin@hgf.org.

4.2.3 DATA PREPARATION BEFORE EXPORTING TO WEALTHENGINE

- Remove names with no address information
- Remove names from outside the US
    - No names from Canada
    - *Possible* Exception: If you have names from the UK, let us know. We MAY be able to run that data separately
- Make sure all States are entered as the official State abbreviations
- Check all columns – is the correct type of data in that column for all records? i.e., emails only in email field?
    - Note additional fields – i.e., Spouse information
- Make sure you have your camp name in the camp field for every record you submit
- Verify that the ID field you have in the spreadsheet is the official ID in your data base and will allow us to re-import the data based on that ID. Every record in your database has a unique identifier that will allow data imported to be connected to that record – this is the ID you need to include with every record.

4.2.4 DATA STRUCTURE FOR SUBMITTING DATA TO WEALTHENGINE

You can find the data structure required for submitting to WealthEngine below. You can also download a spreadsheet with the format here:

http://www.jcamp180.org/uploadDocs/3/WealthEngine_data_upload_format.xlsx

Internal ID	Re-served	Salutation	First Name	Middle Name	Last Name	Suffix	Address 1	Address 2	City	State	Zip	Gift Total	Years Given	# of Gifts	Last Gift Amount
100		Mr.	Kevin		Martone		67 Hunt Street	Suite 100	100	MA	01001	$1518	5	5	$18

Last Gift Date	Largest Gift Amount	Largest Gift Date	Re-served	Date of Birth	Age	Home Phone	Business Phone	Employer	Re-served	Re-served	Spouse First Name	Spouse Middle Name	Spouse Last Name	Camp	Email
3/24/2013	$1000	1/15/2010					413-439-1974	Harold Grinspoon Foundation			Andrea	$1518	Martone	Camp Wonderful	kevin@hgf.org

4.2.5 YOU'VE RECEIVED YOUR DATA FROM WEALTHENGINE...NOW WHAT?

We will have your WealthEngine data returned to you. This data will need to be reimported into your database; you will use your Unique IDs to update the appropriate records in your database. If you don't know how to import data into your database, reach out to your vendor for help. Kevin Martone can also provide support.

Want a detailed description of the WealthEngine data and what it means? We will have a phone conversation to learn more about WealthEngine in the month of March, or you can watch this short webinar from last year's Data2Donors program that featured a WealthEngine representative describing the service: http://vimeo.com/85287792

See the end of this chapter for more tips on how to use FindWealth8.

4.2.6 WHAT DATA (FIELDS) WILL YOU IMPORT?

The exact data you decide to import into your database is up to you; every organization must decide what will be most effective for them. The key is to pull in just enough data to help you make informed decisions.

Our base recommendation is to import the following data:

- P2G Score Combo

- P2G Score Description (for database users who don't understand the P2G Score Combo)
- Gift Capacity Range
- Gift Capacity Rating (for ease of sorting)

You *might* also want to import the following (although you should check some records for accuracy):

- Birthdate
- Influence Rating
- Inclination: Affiliation

4.3 ONE-YEAR SUBSCRIPTION TO FINDWEALTH8

As part of Data2Donors, you will not only run your database through WealthEngine all at once, but you will have access to its online portal called FindWealth8. FindWealth8 allows you to run names manually throughout the year to receive capacity information about those individual prospects. You can also rerun prospects already run through WealthEngine later in the year to check if there have been any major changes to their wealth status and to find additional details about their wealth (donation history; real estate holdings; stock holdings; etc.).

We will provide you with login information – please contact Kevin Martone at kevin@hgf.org if you can't find your login details. This login information will be specific for your camp – the other camps will not be able to review the names that you run through the system.

However, we will be sharing the licenses for accessing FindWealth8 among the various camps taking part in Data2Donors. *So please be sure to logout of FindWealth8 when you are done using it. If you simply close the browser, you may tie up the license and not allow others to access the system.*

4.3.1 WEALTHENGINE FREE TUTORIALS

If you want to learn more about how to use the FindWealth8 tools, you can get a live demo by registering on their website here: http://info.wealthengine.com/findwealth-np.html

WealthEngine also provides 16 free short (5 minute) recorded tutorials that we recommend you watch as you are just getting started. Once you login you can find them by clicking on the green "support" tab in the upper right hand corner. Then click on the green button "view docs" in the top section labeled "Knowledge Base." First in the list of "Popular Articles" is something called the "Nonprofit video training guide." Click on this link and you'll see the list of 16 videos.

They can be viewed with or without a quiz at the end to help reinforce your learning as you go, which you might find helpful.

4.3.2 HOW TO GENERATE AND READ A PROFILE

If you want to learn how to generate and read a profile, we recommend that you watch the first three tutorials.

	Length
Person Search	5:15
The P2G Score	5:14
Ratings and Scores	5:41

The first video will show you how to search for a person in FindWealth8. The second video will show you how to understand the wealth ratings for that individual. The third video will explain the other scores provided for that person. The sequence will take just 20 minutes of your time.

Moving forward, you should develop the habit of selectively researching additional names, as they become known to you. Some camps have made a point of entering in new families that enroll at the camp, or the names of potential donors that volunteers and Board members have shared with you. Always enter pertinent learned information in your database so everyone at camp using the database will have access to those details.

It is a good idea to use the tool while it is free to you, and then decide if it is a service that Camp will want to pay for in the future.

FROM KNOW YOUR DATA TO KNOW YOUR DONORS

CHAPTER OVERVIEW

WHY "FROM KNOW YOUR DATA TO KNOW YOUR DONORS"?

Imagine for a minute that you knew you had complete and up-to-date information on everyone in your database, but you knew nothing specific about any of the individual people represented in your database.

Under these conditions, you would likely employ a fundraising strategy of treating everyone alike, or you might simply separate them into "those who have given" and "those who have not given." This approach would raise a small - but disappointing -- amount of money.

It's time now to move towards getting to know your donors as people so you can establish deep and meaningful relationships with them. The goal is to get to know the people who love camp, to connect with them as individuals, and establish a friendship for life. These friendships will result in generous and meaningful support for Camp.

But getting to know everyone on your list is an overwhelming and unrealistic task. This chapter will encourage you to focus your efforts on getting to know a small set of people as a starting point. You will select the people who have high financial capacity, a habit of philanthropy, and the closest emotional connection to Camp. This is your starting place to raising significantly more money.

Using the results from WealthEngine together with the wisdom and knowledge of your Camp's senior staff and devoted volunteers, you will create a list of your Camp's 20 best Major Donor Prospects.

A "Major Donor Prospect list" includes current major donors whom you hope to move up in their giving amount, or move towards more sustained, consistent, and generous levels of funding, as well as new individuals with high P2G scores and connection to camp, but who have not yet given anything substantial. This chapter covers how to generate this list ; the next chapter will cover how to turn the list into donors.

WHAT WILL BE COVERED IN THIS CHAPTER?

This chapter will help explain how to read and understand the results from WealthEngine, and what to do the information. The majority of this chapter will require you to work closely with a group of volunteers to review a list of prospective major donors. We will walk you through step-by-step how to plan, prepare, host, and facilitate a group of people to look over your list of prospects. This process will provide you with more useful and personal information to aid your major donor fundraising efforts. The chapter will close with the requirement that you finalize a list of your top 20 major donor prospectsand set realistic fundraising goals for each of them.

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5.1. A WORD OF CAUTION ABOUT THE RESEARCH RESULTS

UNDERSTANDING THE RESULTS FROM WEALTHENGINE'S FINDWEALTH8

One of the first things everyone does upon gaining access to WealthEngine is to look up their own name and address. If you do this simple exercise you will likely be confused or a touch discouraged with the program.

I know I was when I ran the program on myself. First, the whole idea of WealthEngine creeps me out. I can't help feeling that way. Second, it says I'm capable of making a major gift of between $5,000 - $10,000. My immediate reactions was, "WHAT?! With two kids in college there is NO way in the world I would be able to make a $10,000 gift. How can I trust any of these results?"

You need to keep in mind that the estimate of my gift capacity is the amount I could afford to give to ALL the charities I support over FIVE years. Therefore my $5 to $10K gift capacity is an estimate of what WealthEngine calculates what I could afford to give charitably to all organization over a five-year period of time. That gift capacity does not estimate the largest gift that that you should ask of me in support of your Camp.

Here are some other things to note when looking at your own score:

First: for low and middle-income families, WealthEngine is less able to predict giving. The results are based on public documents – the estimated value of your home and businesses, contributions to elections, etc. The more public transactions for an individual, the more properties and boats owned, the more donations made, the more accurate the results will be. Harold Grinspoon's profile is going to be more specific, accurate, and interesting than mine.

Run Harold's profile under a "simple search", using Harold Grinspoon, Longmeadow, MA 01106-2326." What did you learn?

Recall that for the very wealthy, some important assets may not show up, such as ownership of multiple businesses, homes, the existence of some kinds of trust funds and family foundations. See the WealthEngine tutorials for more information about this and how the program works around this gap in information to generate a reliable P2G score.

Also you should know that where you live and the housing values in that community can really complicate the results for middle-income families. If a family lives in Los Angeles, for example, their home will look very valuable, but the family might be just barely scraping by from month to month.

You might have more than one person with the same name mixed into the results. For example, in FindWealth 8, we found 19 people with the name Mark Gold in Massachusetts. One of whom is a fantastic major donor prospect, but most of the other Mark Golds are not. You will want to look at the "Quality of Match" (QOM) scores to see if the results are good or muddy. WealthEngine gives you that score to estimate the quality and accuracy of the results.

You might wonder about the names that WealthEngine failed to give a high score that you think should have been included. For example, a current Camp parent with an active and demanding career and kids still in school is less likely to be highly philanthropic at this point in their lives, as compared to the same person later in life who is newly retired with grown children, and with a successful and lucrative career behind them. The younger family might be worth millions of dollars, but simply not interested in Philanthropy at this point in their lives. Have you noticed that most major donors have gray hair?

In conclusion, the "gift capacity" amount is not an indication of the size of gift you should ask for. Running a report on yourself or other middle-income families will not be very helpful.

To estimate what a major donor might give to your camp, you need to understand more about the donor. This includes:

- What is going on in their life currently?
- What other organizations do they support?
- Where does camp rank among their philanthropic priorities
- How much do they trust in your organization?
- How much have they given to Camp in the past?

WealthEngine doesn't give you an estimate of what you can ask for in a major gift because asking for a major gift first and foremost requires strategy, personal connection, and trust.

5.2 MATCHING CAPACITY WITH INCLINATION

(LOOKING AT THE PERSON'S GIVING HISTORY AND CONNECTION TO YOUR CAMP)

The next step for you is to refine your list of major donor prospects. You do this by matching overall capacity to give with their inclination to give to your camp. From among the results from WealthEngine, you will pull a report of P2G scores from best to worst with each donor's giving history and segmentation.

You are looking to match the P2G scores with the depth of connection to your camp.

> **Take off your list**: People who have little capacity AND little to no history of giving to your camp.
>
> **Keep on your list**: People who have capacity to give and who have either given generously or given often. For example, someone who has given $18 dollars for 37 years should stay on the list (for now).

For Example,

P2G Score	First Name	Last Name	Lifetime giving	Number of Gifts	Legacy Member	Alumni
1/0	Harold	Grinspoon	0	0	Yes	No
1/0	Tom	Gold	$7,350	5	No	Yes
1/0	Michelle	Levin	$20,000	1	Yes	Yes
1/0	Ari	Kaplin	0	0	No	No

According to WealthEngine, each of these people has capacity to give very, very generously. But which of these four people would you want to talk to first?

Not Ari, his connection to the camp at this point in time is weak. Michelle has been generous in the past and is also a current Legacy member. A Legacy member is someone who has pledged to remember camp with a bequest gift when they die. That is an excellent indicator of a deep connection to Camp.

We can tell you right now, Harold Grinspoon isn't going to give you a dime unless it comes through his Foundation's program, JCamp 180, so he shouldn't be among your top prospect list, even though he is a Legacy member.

What about Tom Gold in the list above? Would you think he might make a good major donor prospect?

Your task is to create a ranked list based on P2G scores and to start to make some choices about who can be culled from your prospect list. If you need help learning how to pull a useful list from your database, please **contact your database provider**.

As you look over your results, there are two major points to take to heart at this time:

1. A P2G score of 1/0 without any known connection or relationship to camp (other than a Golf Outing donation) should not be a high priority for you right now. It can likely be culled from your list.

2. But a 1/0 P2G score from someone who has demonstrated loyal support over the years should get a personal phone call right now from you to thank that person for his/her support. Seriously, get on the phone right now. Making this list can wait. Pick up the phone. (Why are you still reading this?)

Some camps have found hundreds of 1/0 P2G scores – and need a strategy. If you have a lot of 1/0 among your records, you may need to pull sub-lists. For example, Herzl Camp saw many familiar names among their list of top prospects, leading to a feeling of "Tell me something I don't already know." So they narrowed their search to prospects in various cities out of state where they don't currently have as strong a fundraising connection. Now they are focusing on a strategy to get to know donors who live in the farther away cities, and arranging discovery meetings with house parties featuring the new Camp Executive Director, thus working to expand their major donor pool.

Another camp was both overwhelmed and also overjoyed to find over 250 "1/0" P2G scores among their records, but found they know little to nothing about almost all of them. That might be the case for you, too. In order to extract meaning from the list, you'll need human intelligence. It's time to involve camp senior staff and your well-connected volunteers.

5.3 WHO SHOULD BE ON YOUR MAJOR DONOR PROJECT LIST?

Your next step is to organize a few small gatherings of staff and volunteers to help review your lists. In these meetings, you are seeking any information on the potential donors' connection to your camp, interests, motivation, and past history with your camp. You might also talk about a strategy for connecting with each donor and determining a possible donation amount.

These meetings need to be well planned and facilitated so that they will provide you with more understanding of your potential major donors. The meetings will also help motivate your volunteers to get more involved. If they are not well planned and facilitated, you run the risk of not getting useful information and de-motivating, or worse, freaking out your volunteers. We're going to help you prevent this unfortunate but possible outcome.

How might a meeting to review a list of names freak out your volunteers? In our experience, two things are triggers for volunteers – 1. Talking about other people's money behind their backs and 2. Conducting research into other people's wealth. It is perceived as "creepy" for some people.

Therefore the context for the meeting, the motivation for raising money for the camp, and the environment of trust and respect that you establish in these meetings makes a big difference to reducing fear, stress, and discomfort.

5.3.1 VOLUNTEERS

Using volunteers to help create your major donor prospect list. Engaging volunteers is both time consuming and invaluable. You are seeking people who are well connected, committed, and knowledgeable about your community of donors. This meeting to review lists can include a mix of long-time loyal volunteers, some Board members, and folks who are volunteering for the first time for a "one-time only" commitment.

5.3.2 CONTEXT FOR THE MEETING

Let volunteers know that you need their help to identify new potential major donors to the camp, and that you can't succeed without them. Let them know it is a one-time only commitment of a few hours, at a location and time convenient for them.

5.3.3 MOTIVATION FOR RAISING MONEY

Connect your volunteers to the camp's vision and to a need that is urgent and important. For Example: "As you know, we urgently need a new dining hall, and I could really use your help to identify new donors from a list of people we think could give generously." Or "You know how important scholarship funds are to ensure that kids can attend camp – and last summer families requested three times more aid than we could provide. With your help reviewing a list of potential donors, we might be able to close the gap between the need and what we can offer." Make the motivation and link to camp clear and compelling.

5.3.4 AN ENVIRONMENT OF TRUST AND RESPECT

If you directly address your volunteers' feelings of violating donors' privacy, it will go a long way to establishing a tone of trust.

More on establishing trust:

Here are some key and important things to state to your volunteers. You may want to say this more than once, first when inviting people to participate and again before starting the meeting.

- Our relationship to our donors is very important to us, and we respect anyone's request for privacy. We treat our donor information with the utmost respect and keep information confidential. Therefore if someone here is listed as anonymous, they must remain anonymous.
- We uphold the practices of the "Donor's Bill of Rights" as defined by the Association of Fundraising Professionals, and use best practices in data management and fundraising. (See sample at the end of this document.)
- Stress that this meeting is confidential. Be sure to elicit a commitment that the information you share with one another in the meeting not be discussed outside this meeting.
- I have printouts I've made to help guide our discussion. These printouts should be returned to me at the end of our meeting and should not leave this room. I'm sorry, but I can't allow you to keep this list to review at a later time.
- We are very lucky that the Harold Grinspoon Foundation, and JCamp 180 has generously paid for our list to be researched by a program called WealthEngine. Only a small handful of Jewish camps are getting this service paid for by the Foundation. Colleges, university, hospitals, and many large non-profits use WealthEngine or similar tools to help with fundraising. WealthEngine only

uses public records, such as home values and donations to political campaigns to estimate both the giving capacity and giving habits of the donors from our database.

• From this program, I was able to rank-order our list of potential donors. Based on what little we know of our potential donors, I've given donors a ranking between 1 and 4, with 1 being great and 4 being good, – not great but not bad. (Or I've shared with you the Propensity to Give Score (P2G score) from WealthEngine, with a 1/0 score being their highest possible score in their system. A 1/0 score means that, based on public records, someone is both wealthy and philanthropic. You'll see a number of individuals on this list with a 1/0)

- WealthEngine is helpful, but also limited. It is only a starting point for this process. I need your help to better understand who among this list is most likely to respond to OUR need for help.
- I understand that you might feel uncomfortable at first discussing the people you know on this list, especially as we discuss their capacity to give. I think it might help you feel at ease if you know how this information will be used during this campaign. As you know, the campaign to raise money for (the dining hall, scholarship, endowment fund, etc.), is both urgently needed and important. Only a small number of people have the capacity and the personal connection to our camp to make this campaign a reality. While research helped us to generate this list of people we think have capacity to give, only through discussion with you and others can we start to understand who might be motivated to help.
- During this meeting, any information we learn about a donor will be jotted down as a basic, but informative, note. This note is saved in the donor's file in the database. Any donor can request to read their donor file in the database, therefore we only keep notes that are constructive. Besides the donor, the only other people who have access to the notes are the Development Staff and the Executive Director. On a limited, as needed basis, some members of the Campaign Committee might have access to the notes should they be assigned to help with asking the donor for a gift.
- Here is the kind of information I am seeking from you:
    1. What do we know about this person's connection to the camp?
    2. Who in the camp community knows this person best? Who might be the best person to begin building a relationship with this prospect with camp?
    3. Why might this person be motivated to give to the camp?
    4. What is going on in this person's life that might make this a good time to give to the camp, or a bad time to give? For example, selling a business comes with a huge tax liability – and making a significant charitable donation can reduce the tax burden for a donor. Or undergoing a messy divorce might make it impossible to make a donation right now.
    5. Based on what you know, do you think this person should be among our top 20 major donor prospects?

5.4 THE MAJOR DONOR PROSPECT LIST

5.4.1 WHAT TO INCLUDE ON YOUR PROSPECT LIST

Here is the kind of information that is helpful to include on your prospect list:

Name,
Spouse's Name,
City (or address),
Connection to camp (segment),
Lifetime giving (or range),
Number of donations over lifetime,
Legacy membership,
Age (if known)
Ranking or P2G score
Space for handwritten notes

SAMPLE TEMPLATE FOR A PROSPECT LIST

Leave lots of room for notes.

First Name	**Last Name**	**Spouse**	**Address**	**Past Giving Rating** 1 High 5 Low	**Connection to Camp**	**Notes**
Harold	Grinspoon	Diane		3	Legacy member, Grandparent	
Tom	Gold	Jill		3		
Michelle	Levin	David		2		
Ari	Kaplin	Michelle		5		

5.4.2 HINTS ON FORMATTING YOUR LIST

- Be sure the information is easy to read. Stick with 12 point fonts. Don't try to list too many names on one page – 12 might be enough.
- Do try to group your list with some logic: a list of current parents of campers from the same city might spark a more interesting discussion than a simple alphabetical listing with everyone mixed together.
- Print your list on light color paper.
- Add "Confidential – please return to meeting facilitator."
- Do NOT print the amount of gift capacity provided by WealthEngine. It just seems to provoke unproductive conversations in my experience. If you must, use a code, such as 1 to 4, with 1 being six figure gifts or more, and on down.
- Leave space to write in notes.
- AFTER the meeting, ADD the notes back into your database!

5.5 TIPS AND TOOLS TO RUN A PROSPECTING MEETING

5.5.1. SUGGESTIONS FOR RUNNING A SMOOTH MEETING TO REVIEW PROSPECTS

- Give the meeting lots of relaxed and unrushed time – in the evening or over a weekend, for example.
- Pick a comfortable setting – such as someone's home on couches or at the dining room table instead of at an office desk.
- Bring a gift of food, like coffee cake, to show how grateful you are for the help.
- Have someone take notes while you help review the list with your volunteers and staff. It's hard to both lead the meeting and capture all the good information at the same time.
- Practice running such a meeting with your senior staff first and then your volunteer team.
- Expect resistance and confusion from your volunteers. Just expect it, be calm, and talk people through it as if it's all going to be ok. Which it is. Empathize with people's discomfort. You can say something like, "I realize that you still have questions about this, and I know how you feel because I felt the same way when I first started this process, but let's try reviewing the lists of names now, (or let's move onto the next page and set of names) and then see

if you still have questions when we are done."

- Keep track of time. We've seen the group discussion get snagged on one or two names, with lots of ideas about strategies for approaching that donor or too much past history. While it is all interesting information, if you don't keep track of time, you may not learn much about the rest of your list.
- If you have a larger volunteer group – say more than four or five people – then divide into small groups of three or four people to discuss parts of the list. Divide up the list, and pass it round between the groups. Ask the small groups to make notes about the names they know. This is less effective, but it is better than having 10 people try to discuss everyone on the list at the same time.

5.5.2 AGENDA FOR THE MEETING

Welcome, introductions, overview – see notes above about what to say in your introduction (about 15 minutes)

Walk through the whole long list of names with a quick pass (about 45 minutes). Does anybody know this person? Do you think they might be able to make a gift of $xx,000 or more? What might motivate them to give?

Review and narrow the list to better identify who on the long list should be among the **top 20 prospects** (about 25 minutes). You will need to keep the meeting focused. Keep reminding the group that someone should be on the top 20 prospect list if they have (or could have) a close connection to camp AND could make a meaningful gift if motivated.

5.5.3 STAFF REVIEW OF YOUR PROSPECT LIST

We recommend that you review the list with senior camp staff before sharing with staff and volunteers. Here's why:

1. This will allow you time to practice guiding people through the list of names. You'll feel more experienced the second time around.
2. It will create a safe environment for staff to discuss families and they can be more frank with you than they can be in front of volunteers.
3. You will be able to pare down the list to a more manageable number before you involve your volunteers.
4. You will be able to download important information kept in your Camp Director's head.
5. And it will help develop your Senior Staff's capacity to think about fundraising in a more systematic way. After participating in one of these meetings, I've seen a newly inspired Camp Assistant Director take the lead on connecting with new families with significant giving potential.

5.5.4 GLEANING INFORMATION FROM A PROSPECT LIST REVIEW

Here are some examples of the gems of information you might learn from these meetings. Each of these examples come from things we've heard in these meetings:

1. "She is married now, and her name has changed to (___). Her husband is doing very, very well in finance. She and I hang out together sometimes, and I know she misses camp. I would be willing to talk with her about this campaign if you like."
2. "The two brothers both went to camp, loved it, and have so many camp friends. They both married into very wealthy families. I think we could work with the brothers to make a combined family gift, and we could ask if they would connect us to their camp friends."
3. I'm still friends with her – her parents and grandparents are very wealthy. I wonder if she could have a conversation with her family about how important camp was to her and her sister, and if the family would be interested in helping?"
4. "They met at camp and got married here by the lake back in the 1950's when they were both on staff. I bet they would love to become Legacy members even if they can't make a gift right now. Has anyone asked them about Legacy yet?"
5. "He made the lead gift for the dining hall about 10 years ago, and then was really angry with the new Director when the campaign took so long. I know he still cares about the place, but I don't think anyone has reached out to him in a long while. Honestly, he could have paid for the whole project back then."

In each of the examples above, this kind of personal, detailed information did not exist in the database, but does now! In addition, do you see how your volunteers start to suggest ideas about how to connect to the people on the list? You want to make note of these offers of help or suggestions of connections. This is how you will build your donor strategy that we'll cover in the next chapter.

5.5.5 RETURNING NOTES TO YOUR DONOR'S RECORDS

If you don't know how to make and keep notes on a donor in your database, ask your database vendor, or ask Kevin Martone if he can help.

Two things to keep in mind about making a note in a donor's record: Be aware that legally, a donor can request to read what you write about them. Therefore, it is wise to be kind and careful in your note taking. Also, it helps to add the date that the note was made in the donor's record, so that in the future other people will know when the information was recorded.

5.5.6 THANK YOU AND APPRECIATION

After the meetings are over:

1. Personally thank everyone for their time and commitment!
2. Add the notes back into your database!
3. Finalize your top 20, code your list in your database and set up a tracking system (See Chapter 6 for how to track your donor prospects).

5.6 YOUR TOP 20 MAJOR DONOR PROJECTS

You have finished these meetings with your senior camp staff and volunteers and now you have greater understanding and empathy for the people in your database. The next step is to combine this information into a limited and meaningful list of your best prospects for major gifts.

5.6.1 THE TOP 20

You create this prospect list by using your best professional judgment about your top prospects – with a mix of old and new names. You might also include people who made a multi-year pledge to camp that is about to expire. **This list should be 20 or so people you will prioritize for personal asks the coming year.** Some of the names will likely be easy to connect with and ask, while others will require a great deal more work in the way of connecting, talking, and meeting before you can make an ask.

Now code these top 20 people in your database so you can easily pull a report of these individuals.

5.6.2 HOW MUCH TO ASK?

The next step is to place an expected ask amount besides each person's name on your top prospect list. So, for example, if Dan and Ilana have just finished paying their $18,000 pledge to your camp, you might add them to your list of top prospects, with a note to ask for a multi-year gift of between $10,000 and $20,000, depending on their interest. Or if WealthEngine lists them as a 1/0, you might strategize a plan to ask them for much more, such as the lead gift on the new arts and crafts area at camp, and a $50,000 gift, should they have an interest in the arts among their other areas of interest.

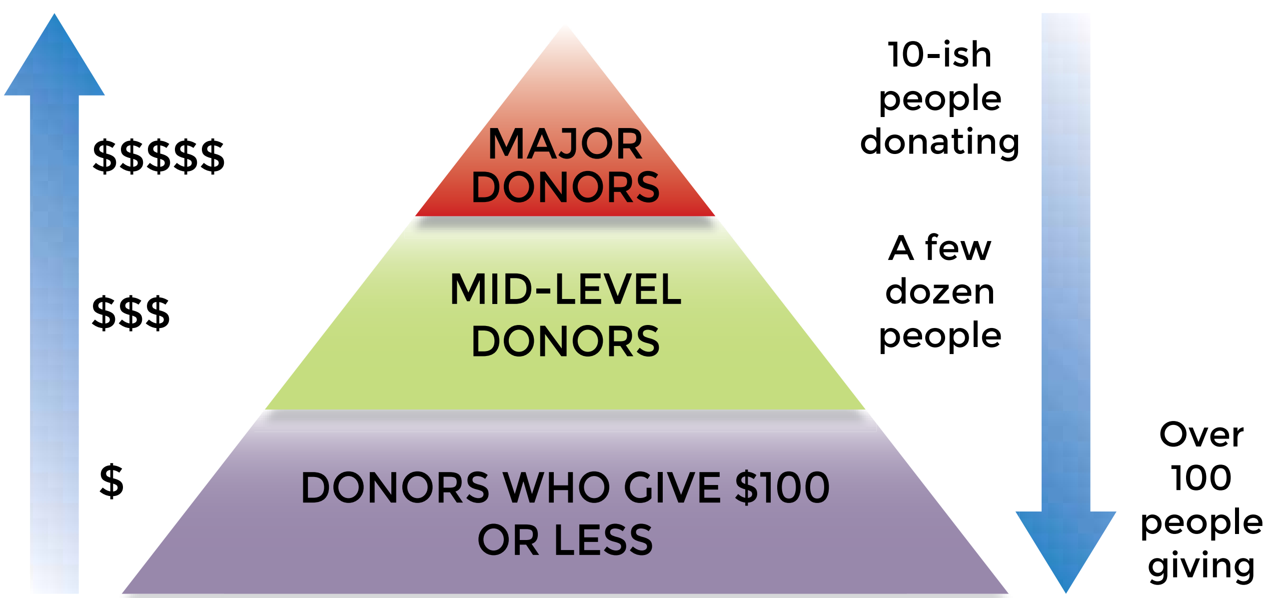
As you make your list, you will want to track the following kinds of information:

Name	Lifetime giving	Largest gift/Date	Who should make the ask	Ask Amount	Notes
Tom Gold	$7,350	$5,000 (2013)	Ilana, Board President, and Rabbi Ari	$50,000	Invite Tom to camp this fall see the old Arts Shed. Ask for lead gift for new arts center.

Remember JCamp 180's expected ten-fold return on investment? My goal is that you will raise $50,000 or more from this list of top prospects. YOUR goal should be to raise 80% or more of your camp's fundraising goal from this list of prospects.

5.6.3 GIFT PYRAMID

A small handful of people are going to give the vast majority of money needed to support your camp. This has always been true in the non-profit sector and it is becoming more so over time. An old adage among Fundraising professions is that 80% of your donations come from 20% of your donors, but often for non-profits it is moving toward 90% of that funds coming from 10% of your donors. If you haven't seen a gift pyramid, it looks like this basic idea:



5.6.4 CHART OF GIFTS

A chart of gifts shows your Camp's donor distribution. This chart can be used throughout the year to track progress towards fundraising goals. You should create a table like this for your camp and use it with your Board and Development Committee members to track progress to date and from year to year on fundraising from Major Donors and progress in growing your base of support over time.

2012 Camp Sunshine Fundraising Goals

	2010		2011		2012 GOAL		2012 YTD	
Donation range	# of Gifts	$ Raised	# of Gifts	$ Raised	# of Gifts	$ Raised	# of Gifts	$ Raise
$50,000 +	1	$100,000	2	$125,000	3	$300,000	0	
$25,000 - $49,999	6	$190,771	5	$136,210	6	$216,000	1	$36,
$10,000 - $24,999	10	$180,345	12	$216,679	18	$324,000	3	$30,
$5,000 - $9,999	29	$169,336	23	$128,507	25	$150,000	0	
$1,000 - $4,999	105	$191,697	85	$160,930	100	$200,000	0	
$500 - $999	69	$41,443	64	$39,599	100	$50,000	1	$
$100 - $499.99	228	$41,520	302	$52,277	300	$60,000	0	
$1 - $99.99	294	$10,687	353	$12,095	400	$14,400	24	$
TOTAL	742	$925,798	846	$871,297	952	$1,314,400	29	$67,
Total Contacts	2400		2521		2891			

Once you've created your chart of gifts like the table shown, please share it with us. We would welcome the opportunity to review it with you. Please talk with Kevin if you want to learn how to pull a report from your database to help quickly create such a report.

5.7 A SHIFT IN THINKING

Through Data2Donors, we've encouraged you to develop a strategy to grow your base of support by growing the total number of people you are in contact with every year. Your strategy is to inspire first time gifts and aim for many people making small and mid-sized gifts year after year.

As you grow your base of support from a growing number of people in your community, you are better able to identify and create a pipeline of new major donors. You'll have more names and addresses of people in your database who are already donating from which you can identify people with capacity to give major gifts.

The first half of Data2Donors encouraged you to grow your base. Now Data2Donors is encouraging you to raise significantly more money from a small number of people within your database. But of course, to do so you must earn their trust, respect, interest, passions, and commitment before they will provide you with their money. Focusing on Major Donor Fundraising requires a shift in focus. That will be the goal of our next chapter.

5.7.1 AN IMPORTANT REVIEW OF D2D REPORTING REQUIREMENTS

A year from the end of this program you will be required to report on the amount of funds you've raised from this program, including:

- The amount you raised from all the new contacts you identified as a result of participating in this program. (People you flagged as D2D.)
- The total you raised from the top 20 (or so) major donor prospects you identified as a result of participating in this program.

Therefore, all the new contacts must be flagged D2D so you can pull a list of them a year from now. In addition, you need to identify your top 20 list now, so you can report on your results a year from now.

TURNING DATA INTO DONORS

CHAPTER OVERVIEW

WHY "TURNING DATA INTO DONORS"?

What is the point of having an up-to-date, complete, and informed donor database if you don't use it for fundraising?

WHAT WILL BE COVERED IN THIS CHAPTER?

This chapter walks you through the tips and tools you can use to manage your major donor fundraising efforts. We'll provide you with instructions for producing a donor profile, creating individualized major donor plans, and empowering your major donor fundraising efforts with the knowledge and skills you'll need.

CHAPTER OUTLINE

6.1 INTRODUCTION: BEST PRACTICES

This chapter will require you to create a plan for each and every one of your top 20 donor prospects and individual donors. How you develop and implement your plan is ultimately up to you, but we'll walk you through a specific set of practices used by some professional Major Gifts Officers in larger non-profits.

The magic to turning donor prospects into donors or to retaining and upgrading major donors is the way you make them feel. Highly personalized, consistent and steady contact with prospects and donors will produce long-time loyalty among your donors.

Applying a highly personalized approach to building relationship with your major donors is worth the investment of staff time and resources. If the work required in this chapter seems overwhelming, then please have a conversation with your Board about investing in more staff time in the budget for Major Donor fundraising. Given the quality of the results you found in WealthEngine it will be worth the organization's investment over time.

To manage personalized contacts with your "Top 20" you will start by creating a plan for each donor, and then tracking your progress over time on each of the plans. This will require teamwork and accountability to stay on track with your prospects and donors. The good news is that you can use your donor database to help you retain information and monitor your progress.

6.2 AN APPRECIATION FOR MAJOR DONOR FUNDRAISING

Before we go much further into the specific planning tips and tools for Major Donor Fundraising, please take about 40 minutes to listen to a recorded Webinar with guest speaker Jeffrey Walker, author of the Generosity Network. In this webinar you will be introduced to some specific ideas of effective approaches to building relationships with prospects that have not yet given a major gift to your Camp.

http://jcamp180.org/knowledge-center/webinars/author-jeffrey-c-walker-joins-jcamp180-to-discuss-the-generosity-network.aspx

6.2.1 MORE RESOURCES

More resources on Major Donor Fundraising can be found on our website's Knowledge Center.

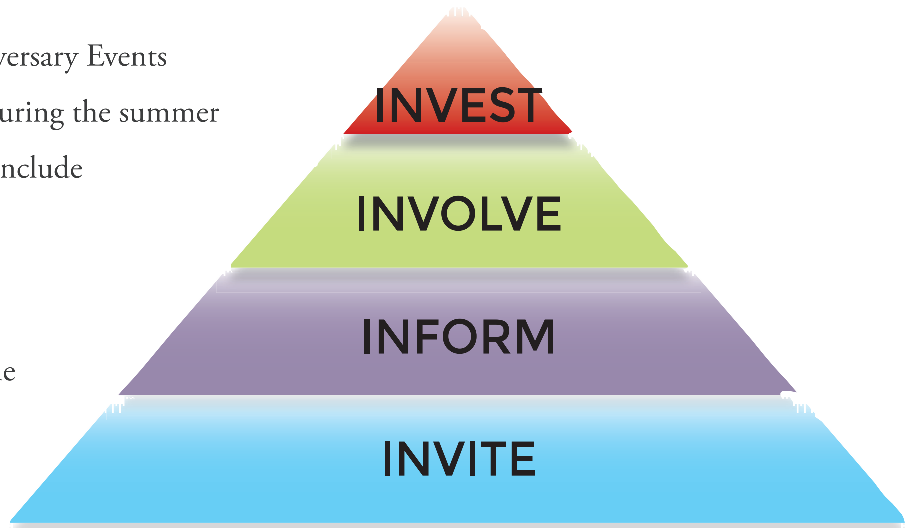
Handouts on conducting a Jeffersonian Dinner can be found here.

6.2.2 POINTS OF CONTACT WITH CAMP

After listening to this webinar, I hope that you'll appreciate how important it is to build "partnerships" with your major donors. It is a process that takes time, with steps along the way that help to build deeper appreciation for the Camp and leads the donor to be very motivated to become an investor.

Let's think about the first step – the invitation. Take a minute to brainstorm the events or points of contact that you might use to connect with your prospects and major donors. You might be able to augment events you already organize to include your donor prospects. This list might include:

- Camp Reunion or Anniversary Events
- Visitors' Day at Camp during the summer
- Family Retreats - could include Grandparents
- House Parties
- Jeffersonian Dinners
- Public presentation of the Camp's Strategic Plan
- A list of cities where the Camp Director is planning to recruit Campers and dates that overlap with the cities where your "Top 20" live
- Mothers' Retreats
- Etc.



These events, with customized invitations tailored to specific donors, will become the foundation of your individual donor strategies.

6.3 CREATING INDIVIDUAL PROSPECT AND MAJOR DONOR PLAN

Back in Chapter 5 you assigned a dollar amount you thought you might ask of each of your major donor prospects, and you might have included a "Likely" and a "Hopefully" ask amount for each of your Top 20. In this part of the chapter we will show you how to develop a plan with specific actions for each individual on your list.

6.3.1 DISCOVERY PHASE

For each Prospective Major Donor who has not made a significant gift yet, you need to add one additional step. You must ask each of your prospects if they are interested in having a deeper connection with you and your Camp. We call this the "Discovery Phase," meaning you discover if they are interested in your organization and want to have more contact with you.

6.3.2 PHASES OF MAJOR DONOR FUNDRAISING

Major Donor Fundraising has various phases or stages:

Identifying Phase	Identify whom among your contacts has wealth, inclination, and some connection to Camp. You did this in Chapter 5
Planning Phase	What you are doing now
Discovery Phase	First point of contact: "Hello. We're not asking you for money. Are you interested in our work? Would you like to be more involved? Might I be in touch with you soon with more information or an invitation?" If no, remove from Top 20 list. If yes, proceed.
Cultivation Phase	Invite to events. Ask for Advice. Involve the Donor. Listen to and learn about their passions and interest. Remember them during the year. Stay in touch.
Solicitation Phase	Asking the right person at the right time, in the right place, for the right amount, for the right cause, with the right people in the room.
Thanking	Ensure you personally thank the donor, and recognize the gift as intended.

Stewardship Phase	Report on the impact of the gift. Stay in touch, maintain the relationship, and continue to meet together.
	Repeat

Once completed, the Discovery Phase will shrink your Top 20 list down. Please don't be discouraged by the rejection you may feel in the discovery phase. If 6 of your top 1/0 P2G prospects are not interested in Jewish Camp at this point in their lives, that is good to know and to respect. It's like fishing – "Bless and Release." You will eventually catch a fish, and it will be a big one. In my experience, Jewish Camps get far more Yesses in the discovery phase than other types of non-profits. The people who understand Jewish Camp typically already have a personal and meaningful connection to your work. The past ten years has raised the visibility of Jewish Camp and its impact on building life-long Jewish Identity, which works in your favor.

Also people in the Discovery Phase are more likely to say YES if they know you are not asking for money or looking for help. At this phase, you are NOT looking for money or help. At this point in time, you are only wondering if there is interest in sharing information, connecting, and participating in upcoming events. (If you are confused about this approach, re-watch the Webinar with Jeffrey Walker posted above.)

6.4 CREATE A CALENDAR

The next step is to map out the whole year's worth of contacts with each of your remaining top Major Donor Prospects. Set up an excel spreadsheet, with basic donor information for your Top 20 list, such as Donor ID #, name, spouse name, city, camp connection, P2G score, ask amount (likely/hopefully) and notes to help you recall this person.

Then add a column for each month of the year, and a column after each month in which you will record your progress. For example, "Pending," "In-Progress," "Post-poned," or "Done."

Donor	**Jan**	P	**Feb**	P	**Mar**	P	**April**	P	**March**	P	**April**	P	**Nov**
Bill Turner	Call to invite to dinner						Camp Dinner Event		Call to follow-up from Dinner				Ask $25k

6.4.1 STEPS TO FILL IN YOUR CALENDAR

On this yearly calendar for each of your Top Prospects:

Step One: Standard Mailings and Communications

1. Add in any mass communications from Camp that might be sent to the prospective donor.

Step Two: Events and Cultivation

2. Decide if the prospect is ready to be invited to an upcoming **Camp Event** in the coming year, and if so add this event to the schedule. (For example, imagine a Jeffersonian Dinner Event is planned for April in the city the donor lives in). Use the brainstormed list you made earlier in this chapter for ideas.
3. Work back three months from the **Camp Event** to personally contact prospect and invite them to the event, gauge their interest.
4. Schedule a personal contact immediately after the **Camp Event**.

Step Three: Solicitation

5. Add in the date of the expected Solicitation and **expected amount**. Try to spread out the asks during the year; it isn't realistic to try to reach everyone on your list in the same month.
6. Think about who should join you in the meeting for the ask. For example, the ask might include the Camp Director, yourself, and the donor's close friend who has already made their own donation to Camp, along with the Donor's spouse. If so, that is a lot of people to coordinate on finding the right date and time to meet.
7. Work back three months leading up to the solicitation
   a. Request for a solicitation meeting (3 months out)
   b. Provide a report from Camp (2 months out)
   c. Send a written prospectus (1 month out). A written prospectus is a proposal customized for the donor to fund the things s/he is interested in. It could also be your Case for Support in the Capital Campaign. The prospectus is short and doesn't include the ask amount.
   d. In-person Solicitation
   e. Thank you

Step Four: Stewardship and Personal Connection

8. Plan for any "Thank You" events that might follow the solicitations. If funding a building, there might be the date of the dedication event to add to the calendar.

9. Schedule the month when you will write and mail (or hand deliver) a written report on the impact of the gift. This report MUST be sent before the next time you solicit this donor.

Step Five: "Hello, Dear Friend" or "Thinking of you"

10. Review the year. If there are any empty months, fill it with HDF ("Hello, Dear Friend") contacts. These or quick, highly personal, contacts with a donor that relate to them as people, such as a hand written birthday card, a book on a hobby of theirs, an article you read that made you think of them, a quick email message – "thinking of you." Something simple. But add it to the calendar.

6.4.2 REVIEW: TYPES OF DONOR CONTACTS

There are a number of different types of donor contact points you should be planning for every prospect and major donor on your list. Everyone should receive a healthy balance of the following contacts from your organization.

1. **Event Invitations** – Implement donor gatherings (such as Jeffersonian Dinners, or augment events you're already implementing to include donors. These events are scheduled into your plan. The donor's attendance is documented in the donor database, so you have institutional memory of their engagement.

2. **Report on the impact of giving** – Every major donor needs to know if and how their specific gift made a difference. Right now, you will plan to write and provide each major donor with a report on the impact of their giving. In place of a report, you may want to plan for the Donor to see your program in action at Camp during the summer, or in some other "hands-on" method. These individualized and personal donor trips to the field to witness the direct impact of their major gift is both moving and motivating. Note that this is not a time to make another ask. This is a time to celebrate the donor and to witness the difference they have made in the world.

3. **Solicitation** – Start with identifying the month you expect a donor or prospect to make a gift. Now work backwards three months. For example, if you expect Ms. Steinhart to give in November, you'll need to schedule a high level strategy starting three months prior to set up that solicitation. So in August, you are starting to set up the meeting for November, and then in September, sending a report on what her last gift accomplished, and finally in October you send her a prospectus (proposal) to set up a face-to-face meeting in November.

4. **<u>Thank you calls</u>** – These calls are random and are in addition to the thanking that takes place right after the gift is made. Randomly thanking donors during the course of the year will endear them to your organization. For example, "Just leaving you a message to say "thank you." Last night our Scholarship committee met for 4 hours to allocate funds to 28 families requesting help to attend camp this summer. I know for sure that without your generosity this year we would have had to turn even more families away. Tonight, you are some kid's hero." This is a powerful and affirming message to find on your voicemail.

5. **<u>"Hello, Dear Friend" communications</u>** – these are hand written notes, quick emails links, or even cut-out magazine or newspaper articles sent to your donors that are of personal interest to them. It should be something to let them know that you are connecting with them in a unique and personal way, and taking the time to recognize them – not as donors but as good people. Mailing a donor a book on a topic related to a hobby or interest is one example. Did the two of you chat about great eats in Israel last time you met? Then follow-up with a link to the little café you discovered in your last visit. These communications have NOTHING to do with you, or job, or the Camp. Nothing. Plan on two HDF per-year per-donor as your goal.

6. **<u>Face-to-face</u> cultivation visits** <u>without</u> an ask – Not every face-to-face visit should involve a solicitation. Some visits are meant to report back to donors how they made a difference and/or find out their passion and interests so you can get to know these good people and develop a deeper relationship with them. "I'm going to be in town next month anyway, can we get together for coffee? It would be great to connect again."

7. **<u>Mass Communications</u>** – **The donor's schedule also includes standard donor contacts, such as newsletters** sent to all donors, and other key communications, such as invitations to events – but as much as possible these are *personalized* for top donor and donor prospects. Add a sticky note to let them know that you noticed them with this mailing.

6.5 CREATING A MAJOR DONOR PROFILE

After you've finished your Discovery phase, and created donor plans, it is likely that your Top 20 list will have shunk down to a shorter list of people, some of whom you know better than others. Your next task is to create a one-page donor profile sheet with a target ask amount for each of your remaining Major donor prospects.

The Donor Profile is a quick and easy to read and understand one-page snapshot of pertinent information about the donor. A Donor's profile is shared with only one or two people who are trained to solicit this donor.

Enclosed are two sample templates of Donor Profiles. One is a basic template, and the other is designed to help your volunteers plan for a soliciation.

See samples below.

Name of Donor:

Names of Spouse:

Email: Phone Number:

Names of Children:

Profession(s)

Home Address:

Business Address:

History with Camp:

Giving History to Camp:

Other Philanthropic Interests:

Recent Points of Contact with Camp (Events attended & Date, face to face meetings):

General Notes and Background

Sample SOLICITATION, PREPARATION and DONOR PROFILE FORM.

DATE
PROSPECT NAME: CAPACITY RATING: INCLINATION RATING:

SPOUSE NAME: SPOUSE ATTENDING?
CONTACT INFO

STAFF/VOLUNTEERS ATTENDING:

MEETING DATE/TIME/PLACE

MEETING PURPOSES:

RECOMMENDED ASK AMOUNT/PURPOSE OF THE GIFT:

RECENT CULTIVATION/SOLICITATION HISTORY:

CAMP BACKGROUND: (Camper, CIT, Counselor, Staff, Volunteer, Board, Parent, Grandparent)

CAMP PERSONAL CONNECTIONS/INFLUENCERS:

CAMP GIVING HISTORY:
FIRST: AMT/PURPOSE/DATE
LAST: AMT/PURPOSE/DATE
LARGEST: AMT/PURPOSE/DATE
OTHER SIGNIFICANT GIFTS/OUTSTANDING PLEDGES

PERSONAL INFORMATION
OCCUPATION
BUSINESS TITLE
BUSINESS ADDRESS
EDUCATION
CHILDREN/GRANDCHILDREN

WEALTH INDICATORS
Real Estate, Stockholdings, Business Ownership, Salary, Other Known Assets, Family Foundation

KNOWN PHILANTHROPY
VOLUNTEER INTERESTS
TEMPLE AFFILIATION:

The information you use to create the Donor Profile can be found in your donor database and in FindWealth8. Having an agreed upon template with only the specific information you and your volunteers will need is helpful so you don't have too much or too little information. Then you can systematically track and keep this information.

6.5.1. SAVING YOUR DONOR PROFILE

Once created, a copy of the Donor profile can be uploaded to the Donor's record in your Donor Database. If you don't know how to do this, contact your database vendor (or ask Kevin for help).

6.6 REACHING FUNDRAISING AND FRIENDRAISING GOALS

Fundraising is raising money, while "Friendraising" is raising friends, also known as Alumni Outreach and Engagement. The purpose of this program is to help you expand your base of support, grow the total number of donors giving to Camp, and raise more money from Major Donors. Creating a set of major donor plans isn't enough – they must be executed. To successfully work the plan and see results requires **teamwork, tracking, reporting, and accountability.**

6.6.1. TEAMWORK

No one person can fundraise alone. Who is on your team to support Major Donor Fundraising? The team needs time together to strategize, plan, practice, and play. The team members need to understand each other's position on the team, and agree upon roles and responsibilities. Some teams benefit from professional coaching, either from a JCamp 180 Mentor or a paid campaign consultant.

If your team includes the Camp Director, how much of his/her time will you get? Will it change from month to month? For your primary volunteers on the team, how well informed and trained are they? Successful major donor fundraising requires a team.

6.6.2. TRACKING

Without tracking, much of the progress (or lack of progress) in major donor fundraising will be invisible to the team members. Tracking ensures that donor relationships are cultivated over time, the plan is attended to, and the database is maintained. Answer these kinds of questions:

- Who is primarily responsible for tracking gifts, sending thank you notes?
- Who is maintaining the database?
- Who is looking at your month-by-month donor plans and tracking/recording the progress made?
- Who is paying attention to, tracking, and responding to donor communications?

- Who is coordinating major donor visits and event participation?

Plan ahead for who will work on the various tasks of tracking to ensure it gets done.

6.6.3 REPORTING

Schedule 3 or 4 times a year to report on progress towards your fundraising goals, using the Chart of Gifts you created in Chapter 5. This report is used by the team, your boss, and in some cases the entire Board. In addition, schedule a monthly review of the month-by-month plan for major donors.

While you are in the mind-set of reporting – Here is a list that we recommend you include when reporting:

- **Year-to-date Chart of Gifts** compared to year-end-goals and past year results.
- **The Donor Retention Rate:** Number or Percentage of existing donors who gave again this year.
- **New Donors**: Number of new, first time donors to the organization.
- **LYBUNTS** Number of donors who gave last year, but who have not yet made a gift this year. LYBUNT stands for "last year but unfortunately, not this year." These are the people you want to make sure give again before the end of the year, because retaining donors is much easier and less costly than getting new donors.
- **Lapsed donors/SYBUNTS**: the people who gave "**some** year but unfortunately not this year." You want to track this information because inviting people back to give again is much easier and less costly than getting brand new donors.
- **Total number of active, good contacts in your database.**
- **Total number of Legacy members.**

6.6.4. ACCOUNTABILITY:

The team needs to hold itself accountable for getting things done as agreed, and to support one another to be successful. Without both the positive energy of teamwork, and the possible sting of accountability, it is hard to stay highly motivated and goal-oriented.

One way to build in accountability is to plan on celebrating success in your fundraising goals. Celebration is a step we often overlook. For example, plan to have a meal together for every $100,000 raised during the year, and list the 6 places from cheapest to most expensive as you meet your goals. Pizza for the first $100,000, sushi for the $500,000 mark, and should you get to $600,000…

6.6.5 SETTING GOALS

When setting goals for major donor fundraising, we recommend that you define dollar and non-dollar goals for the year.

The dollar goals might include:

- Grow the total number of new donors (from x to y)
- Improve the retention of past donors (from x% to y%)
- Increase the total number of donors giving $1,000 and above (from x to y)
- Increase the total amount raised from the top twenty donors (from $x to $y)

Examples of Non-dollar goals:

- Host three events in the coming year that engage more new friends, as well as the usual crowd.
- Commit to building meaningful donor relationships above all else – even above obtaining a donation.
- Communicate to young Alumni that we want to stay connected in both words and actions through Facebook and social gatherings around the country.
- Train everyone on staff about fundraising and instill a staff-wide appreciation for how we can all work together.
- Delight at least three donors this year beyond their expectations.

Recall that Data2Donors is aiming to help you increase the total number of engaged Alumni contacts in your database as well as improving your major donor fundraising. Your goal-setting should reflect the desire to grow your base through Friendraising efforts as well as increase the amount of money you raise through Fundraising. Thus, you need to define your Friendraising and non-dollar goals just as much as you need to have clear fundraising goals.

6.6.6. EXCEEDING GOALS

Each year you will be defining two levels of fundraising goals for the year. The first fundraising goal is the realistic and obtainable number that you will use for the purpose of budgeting and planning purposes. It is an amount you are confident can be obtained.

The second Fundraising goal is your inspired goal. This dollar amount is the one you use with your Fundraising team and volunteers. For example, you might budget a 2015 scholarship fundraising goal of $35,000 to surpass last year's goal of $32,000 from 54 donors. But that is not your personal goal, since you have in mind two donors to engage for scholarship asks in the coming year and ask for $5,000 each. Your chart of gifts would reflect $44,000 from 60 donors instead.

Each year aim to surpass last year's goals.

Each year celebrate your accomplishments.

Each year thank everyone, especially your team and your best donors, for their help making it another outstanding year.

Each year recall that you are some child's hero for creating the most awesome summer ever.

DOING THE CELEBRATORY DATA DANCE

CHAPTER OVERVIEW

WHY "DOING THE CELEBRATORY DATA DANCE"?

It's time to celebrate all your hard work and maintain the database so it stays in great shape.

WHAT WILL BE COVERED IN THIS CHAPTER?

This is a short chapter. It covers some ideas for good data management habits to maintain all the good work you've done to date.

CHAPTER OUTLINE

7.1 ONGOING DATABASE MAINTENANCE

Your data is clean NOW. But what about the future? How do you ensure your data stays clean and you are using the data effectively to maintain strong, ongoing relationships with your alumni, donors, and other prospects?

Make sure these tasks don't fall through the cracks and waste all of the hard work you've done so far:

- Continue to reach out to your alumni and volunteers. Updating and adding alumni to your database is a process that will never end…and will continue to pay dividends.
- Implement (and reiterate) your processes and data standards to ensure data consistency over time. Write them down.
- Implement a communications plan for reaching out to your various constituents and staying engaged with them. The data in your database is useless unless you actually leverage it for your fundraising and outreach efforts.

7.2 WHAT ABOUT THE DATA?

In addition to maintaining regular communications to leverage your database, you must dedicate resources to keeping your database up-to-date. Standards and processes must be agreed upon and documented to ensure the data stays clean and up-to-date. What are some ways to keep the data clean?

a) **Single database** – As people submit information via online forms, register for events, donate to camp, etc., their data must be entered in the database or updated based on the new information. No spreadsheets should be maintained with information NOT in the database.

b) **From campers to alumni** – A regular process for moving campers/parents/staff from the camper registration system to the donor database must be implemented. This process should be run annually to be sure no records fall through the cracks. For example, camps might pull all parents and any campers/staff who turned 18 during the past year into the donor database; records in the database must then be deduped immediately (Duplicate records merged so every person is in the database only one time). Kevin (kevin@hgf.org) can help you determine a specific process that works best for your camp.

c) **Ongoing prospecting** – New donors and families should be prospected regularly using the methods mentioned above. As new information is learned about existing constituents, that data must be tracked in the database as well.

d) **Data clean-up spring cleaning schedule** – Now that you've worked hard to clean up and de-dupe your records, you'll want to put into place a regularly scheduled spring cleaning of your database to ensure it is up to snuff.

e) **Procedures written down** – Make sure you have a document in place for how to process gifts correctly and how to enter information into your system. Make it available to all staff, especially new hires.

f) **Cross-training** – Don't be the only one in the office who understands the system. What if you get hit by a bus? Train others on how to use your systems. Want to be sure your Camp Director can see a major donor's file before a donor visit? Teach them how to use the system and how to enter notes from the meeting afterwards.

g) **Ongoing WealthEngine research** – Since you have this tool for a year, use it for new names and prospects.

h) **Learn to pull reports** – Now that your database is in tip-top shape, use it to help you raise more money. Get into the habit of sending out segmented and personalized appeal letters. Pull reports of lapsed donors and get back in touch with them. Use the database to remind you of pledge payments and personalize the pledge reminders.

7.3 REPORT YOUR PROGRESS AND ACCOMPLISHMENTS

In the first Chapter you conducted an assessment of the current condition of the database. Now that you've completed this course it is time to stop and reflect on your accomplishments you've made, and to share this report with your Board of Directors. You have a lot to be proud of and it should be know!

7.4 END NOTE

REPORTING REQUIREMENTS FOR DATA2DONORS

A year from the end of this program you will be required to report on the amount of funds you've raised from this program, including:

1. The amount you raised from all the new contacts you identified as a result of participating in this program. (People you flagged as D2D.)
2. The total you raised from the top 20 (or so) major donor prospects you identified as a result of participating in this program.

Therefore, all the new contacts must be flagged D2D so you can pull a list of them a year from now. In addition, you need to identify your top 20 list now, so you can report on your results a year from now.

Thank you for your participation in Data2Donors. We hope you've learned a lot and continue to work hard in this program. Please share with us your evaluation of your experience and suggestions for improvements.

Julia Riseman and Kevin Martone, October, 2017

Thank you for participating in Data2Donors. We wish you the best of luck in raising money for your Camp in the months and years ahead. Please stay in touch with your results. We want to celebrate your success.

I once had a camp Board member and Camp Alum ask me, "Why would anyone donate to an *overnight camp*?"

I'm sure this Board member was thinking about the parents who already pay a lot in tuition to Camp. Or how for decades this camp had failed to fundraise because it sustained itself from profits generated from the organization's operations. What this board member failed to realize is that there are many wonderful and personally meaningful reasons why someone would want to give back to their camp!

18 GOOD REASONS WHY SOMEONE MIGHT GIVE BACK TO CAMP

1. To care for this magical place called Camp
2. In recognition (or memory) of my closest and life-long friendships
3. L'Dor Vador: to pass this experience down from Generation to Generation
4. Because I am inspired by the vision for the camp's future
5. Nostalgia, sentimental feelings, and to connect to the past
6. We do it for the kids – it's the right thing to do
7. Judaism – Jewish Overnight strengthens life-long Jewish identity.
8. Because it meant so much to me when I was young
9. Camp saved me during a troubled time in my life
10. To make a lasting difference: now and for generations
11. Camp was such a caring place for me, I want that for my kids and others
12. To carry on our camp traditions
13. FUN! The most fun I've ever had being Jewish
14. A fondness and a connection to my youth; I loved it
15. I got scholarships when I was a kid, now I want to pay it forward
16. To see my name on the wall up at camp
17. Because of who asked me, I couldn't say no
18. Because I was asked

Why do you give?

Embrace the personal and powerful reasons why people give to Jewish Camp.

APPENDIX

A: A LIST OF FUNDRAISING WORDS YOU SHOULD KNOW FOR THIS PROGRAM

Donor database

- Constituent
- Segment / Segmentation
- Flag / Flagging
- Lapsed donor
- Reports / Pulling Reports
- Dedup/ Dedupping
- LYBANT, SYBUNT,
- Gift pyramid
- Lifetime value
- Average gift amount

Major Donor

- Donor profile
- Prospect list
- Special event donor / Gala donor
- Pipeline
- Prospect
- Identification
- Qualification
- Discovery phase
- Cultivation
- Solicitation

Stewardship

Alumni Outreach

Engagement

Donor acquisition

Alumni vs. friends/Fans of camp

Reunions / Anniversary Events

Welcome Packet

Appeals

Call to Action

Ask

Offer

Annual Appeal

End of Year Appeal

Campaigns

Annual fundraising

Unrestricted fundraising

Scholarships

Operations

Programs

Capital

Legacy

Capital Campaign

Case for support / Case statement

Chart of Gifts

Feasibility Study

Planning Phase

- Quiet Phase
    - Lead Gift
    - Leadership Gifts
- Public Phase
- Celebration Phase

Prospect rating

- WealthEngine / FindWealth 8
- Propensity to give (P2G)
- Quality of Match (QM)

B. HOW TO PREPARE FOR A D2D WEBINAR CONFERENCE CALL

- Arrive early and be sure your technology is working
- Use a headset or landline for best sound quality
- Have paper and pen ready for note taking
- If there is background noise where you are, please use the mute option.
- Try to refrain from reading email or doing other tasks while on the call.
- Prepare your specific questions in advance. You'll find the session more productive if you know what you want to ask.
- Recall that everyone, not just you, feels a little uncomfortable talking in this set-up. But the more participation there is, the more comfortable it becomes. Engage others by contributing yourself. If someone ventures a question, make an effort to answer, even if you say, "That's interesting."
- These monthly webinars allow for in-depth discussion of the issues you are facing and to learn from other camps doing the same work. These will be discussions, not lectures, so it to your benefit to engage and be an active participant on these calls.
- Be prepared to share your work with others. If you are working with volunteers, create a job description and share it with everyone. If you create a better format for a donor profile, share it. If you develop protocols on how to enter in data correctly, share it. If you update your website, share it. The more we all share, the more we can learn from one another. Come to each call with something to share.
- If after the call, you have a suggestion for improving the quality of the interaction, please let us know. We are interested in experimenting to create the best learning environment possible for everyone.

C. WHAT TO DO WHEN YOUR DATA COMES BACK FROM ALUMNIFINDER

Congratulations! You've done a lot of hard work updating your database. And now you've got even MORE updated data from AlumniFinder. But what do you do with all of that data?

Here we'll make recommendations for how to bring all of this great data back into your database. But remember that it is ultimately up to you to review the data to ensure you are improving your data and not replacing good, current data with less accurate data. Hopefully the instructions below will help you ensure you use this new trove of data as effectively as possible.

Let's get started!

General Tips for this process

1. Sort and filter your spreadsheet by AlumniFinder Codes and other columns to make it easier to review and prep for import into your database.
2. You may want to remove any records that have no changes at all – that will reduce the number of records in your active spreadsheet.
3. For records that require individual review, work through them one-by-one, keeping track of where you leave off each time you get interrupted.
4. Give yourself enough time to work through this process. We've broken it down into multiple steps to make it easier to plan ahead. Start the tasks well in advance of your deadlines and schedule time for help if needed.
5. BACK UP YOUR SPREADSHEET REGULARLY! Even if you just email the spreadsheet to yourself every so often, you'll want a backup version in case the file gets corrupted while you work on it. Be sure you have a backup version to fall back on!

*__Note: Remember to Flag all of the records you update from AlumniFinder as Data2Donors__

Address

- Bring in all addresses that are coded as V,R, or M

    • You CAN compare them to your existing addresses, but AlumniFinder guarantees these are either more up to date than your existing address (or the same).

- Addresses marked as N should be set aside to check with volunteers or board members at a later date. Only when verified as an improved address should these be used to update your database.

Secondary Address

- The easiest thing to do with Secondary Address is to simply import into an alternate Address field in your database. You could even create a new set of Address fields called "AlumniFinder Secondary Address" and import them there. You'll only use these addresses if you find that your main address for a contact is no longer active.
- You could also check all of these addresses like above (V,R, M), but as long as you aren't overwriting any addresses in the database, this effort probably isn't necessary.

Date of Birth

- Compare the DOB's that were returned from AlumniFinder with the DOB's already in your database:
- If you don't currently have a DOB in the database, import the AF DOB.

  • Note: If you received a DOB from AF that has zeroes in the month or day fields, you may have to change them to 1's to import it into your database. For example, 00/00/1975 will have to be changed to 01/01/1975 to import into most databases.

  • You won't know their actual birthdate, but you'll be able to determine their approximate age, which is valuable information to know.
- If you DO have a DOB in your database for a contact, only import if the DOB from AF is more complete or seems more accurate.

Phone (Home/Landline)

- Compare the Phone #'s that were returned from AlumniFinder with the Home Phone #'s already in your database:

  • If you don't currently have a Home Phone # in the database, import the AF Phone # there.

  • If you DO already have a Home Phone # in the database, consider importing into an alternate phone field.
- Alternatively, all of the phone numbers returned from AlumniFinder can be imported into an alternative phone # field; you could even create a new field called "AlumniFinder Phone #" and import all of the phone #'s into that field for simplicity.

Emails

- Compare the Emails that were returned from AlumniFinder with the Email address already in your database:

• If you don't currently have an email address in the database, import the AF Email address

• If you DO already have an email address in the database, consider importing into an alternative email field. You could also create a completely new field called "AlumniFinder Email" and import all of these emails into that field.

Deceased

- Before you do anything with people marked as Deceased, verify this information.

  • Check online to see if there is an obituary.

  • Check with volunteers, board members to see if they can verify.

  • Once verified as deceased:

    • If the person has their own individual record

    • Mark them as Do Not Mail; set Do Not Mail Reason to "Deceased." If that field doesn't exist, mark it in the Narrative/Description field.

    • Add the deceased date to the Narrative/Description field.

  • If the person is on a record with a spouse/partner

    • Make the spouse/partner the main contact on the record

    • Change the Salutation and Envelope Name to reflect only the remaining partner's information.

    • Add the deceased person's name and deceased date in the Narrative/Description field.

Names

Note: This may be a process you set aside until later. You probably don't want to mass update any of these changes and instead want to check each manually to verify first.

- Check updated names with the names you already have in your database.

  • Import (or manually update) any name changes you feel comfortable with

  • Set aside other name changes to be checked with others – volunteers, board members, alumni, etc.

Get Started!

Remember, this process takes time and concentration. Don't postpone working on it. The sooner you get to it, the better shape your data will be for your ongoing use (and for exporting to WealthEngine!).

Template for creating a State of the Data report

WHY: Why is Data management strategically important to Camp SUNSHINE?

Current Condition: What are the current limitations or problems?

Solution: What are we doing now to address these problems?

When will this work get done?

Who is involved?

How much will it cost?

ROI: What will be different after these efforts are implemented? How should we monitor progress and improvements?

Looking Ahead: What else could be done to improve data management in the future that we will not address now? Why have we decided to post-pone this work for now?

Volunteer Management for Data2Donors 2017-2018

	1	2	3
	Volunteers for Alumni Outreach	**Volunteers for Identifying Prospects**	**Volunteers for Soliciting Major Donors**
Tasks	- Review ideas for finding lost Alumni - Connect with old camp friends, and get updated addresses - Review lists of names without addresses - Review "welcome back" packet - Invite folks to camp events and reunions	- Reducing your list of MD prospects from 2000 to 200 down to your top 20 - Provide you with better background information - Help to start opening doors	- building closer relationships with your 20 top major donors and your new major donor prospects - Help you develop individual plans for each - Review Case for Support - Volunteer to meet with and ask for gifts from members of the top 20
Who is ideal	- Alumni of different ages - Well respected and well connected - Able to follow-through	- Well connected in the camp and Jewish community - Able to respect confidentiality of the list and the information shared - Motivated to support camp	- Already giving generously to camp - Supportive of the Campaign - Knowledgeable about the camp's leadership and current need - Well respected and well connected - Able to follow-through
When do you need them in this program?	- Starting now and on-going	- Recruit now - work hard in May/June 2018	- Recruit now, schedule training, and work June 2018 to June 2019
In the D2D book	Chapter 2	Chapter 5	Chapter 6
Other Resources	Samples from other camps		- Extra in-person training from JCamp 180 Mentors - Case for Support

Campaign Readiness Evaluation

For more information on Jewish Camp Capital Campaign Planning, please watch:
https://jcamp180.org/knowledge-center/fundraising/recipe-for-successful-capital-campaigns-webinar

Instructions: Circle a number from 0 to 5 for each statement:

0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

1. Prospects

---

1) The stakeholders of your organization think highly of your programs. **0 1 2 3 4 5**

- Have you done client/stakeholder satisfaction studies?
- Do your stakeholders support you financially?
- Do you have current contact information for most or all of your stakeholders?
- Do your stakeholders volunteer for your organization?
- Have you included your stakeholders in focus groups or other ways of evaluating the success of programs and their interest in your long-range/strategic plan?

2) Top 100 donors have been identified, qualified, and cultivated. **0 1 2 3 4 5**

- Can staff pull a list of the top 20% of your donors with ease?
- Do you have a donor recognition program in place?
- Do you have a donor cultivation program in place?
- Do you communicate with your major donors regularly?
- Does the Board help with identifying, cultivating and soliciting your major donors?

3) There are individuals who could give 10% of the goal if they desire to do so. **0 1 2 3 4 5**

- Do you have at least one Board member capable of giving 10% of goal?
- Do you have a list of major donors capable of making a gift of this size?
- Do you do adequate research on donor prospects to identify gift potential?
- Have you done research to identify the interests of your top donors?
- Do you have the giving histories of your top donors?
- Do you have written profiles for your top donor prospects?
- Have you created a campaign gift pyramid based on your donor prospects and campaign goals?

NOTES:

Instructions: Circle a number from 0 to 5 for each statement:

0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

2. Leadership

4) The Executive Director a leader who will promote the campaign. **0 1 2 3 4 5**

- Has the ED been with the organization at least two years?
- Is the ED well known and respected within the field?
- Is the ED well liked and respected by staff?
- Is the ED well liked and respected by your stakeholders?
- Does the ED understand his or her role in the campaign?
- Does the ED currently have a list of major donors that he or she is responsible for cultivating and soliciting?

5) The Board President/Chair is recognized as a strong, able community leader. **0 1 2 3 4 5**

- Has the President/Chair been on the board of directors at least two years?
- Has the President/Chair been on the board less than six years?
- Is the person known and respected in the community and shows good judgment?
- Is the Board President/Chair committed to supporting the campaign?
- Do other Board members work well with the Board President/Chair?

6) The Board of Directors has good structure and is functioning well. **0 1 2 3 4 5**

- Does the Board meet regularly
- Does the Board understand its governance role?
- Does the Board support the Campaign?
- Does the Board have some members who are well respected in the community and who have worked on other campaigns?
- Do you have a board that reflects the diversity of the population in the community and the clients served?
- Does the Board have some members who have affluence and influence?

7) The Board is willing to work on the campaign. **0 1 2 3 4 5**

- Will at least three members of the Board serve on the Campaign Committee?
- Will 100% of the Board play some role--solicitors, public relations, phonathon, special events, etc.?
- Can the Board identify potential major donors for the campaign?
- Does 100% of the Board participate in annual fundraising efforts with their own giving?

8) The staff has enough experience and knowledge in the field of fundraising. **0 1 2 3 4 5**

- Do you have a full-time Director of Development?
- Does the Development Director have access to support staff for database management and administration?
- Is the Development Director included at highest level of the organization's leadership?
- Are the development staff members of AFP, CASE, AHP or other professional association?
- Has the staff had any campaign experience?
- Has the Development Director's time been freed up from things like event planning to be able to focus primarily on Campaign Fundraising?
- Is the staff free from over-involvement in other non-development related tasks?

NOTES:

Instructions: Circle a number from 0 to 5 for each statement:

0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

3. Compelling Case

9) The Board has reached consensus on campaign plan and goal. **0 1 2 3 4 5**

- Has the Board discussed and evaluated the various options for building plans?
- Has the Board has been involved with the architectural/construction planning?
- Has or will the board participated in the feasibility/planning study?
- Does 100% of the board approve of this project?
- Does at least 80% of the board feel the goal is possible to reach?

10) Your Case for Support is well researched. **0 1 2 3 4 5**

- Have you done a planning study to determine community support?
- Have you done a market study to determine the need for this project?
- Have you done an architectural study to determine feasibility and costs of project?
- Have you considered and evaluated endowment needs?
- Have you considered the need for on-going scholarship and annual support?
- Have you increased revenues or decreased deficits in the past two years?
- Have you had a balanced budget for at least two years?
- Do you have a projected three-year budget for the organization?
- Do you have a line of credit or availability of a bridge loan during construction?

11) Your campaign initiative is exciting, ambitious, and worthy of support. **0 1 2 3 4 5**

- Have you developed a preliminary case for support?
- If so, have you tested this case among your constituents in any way?
- Does the Case for Support answer the following questions for the reader:
    - Why this project?
    - Why now?
    - Why this amount of money?
    - Why me?
- Is the Case for Support emotionally compelling and urgently important to your stakeholders?

NOTES:

Instructions: Circle a number from 0 to 5 for each statement:

0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

4. Institutional Commitment

12) The long-range plan with written goals is in place. **0 1 2 3 4 5**

- Have the board and senior staff developed or updated your strategic plan within the last three years?
- Is the plan reviewed at least quarterly?
- Are objectives specific and measurable?
- Does the plan include a budget, timeline and areas of responsibility?
- Is the plan evaluated and revised, if necessary, at least quarterly?
- Does the plan place the Capital Campaign as a highest priority?

13) The Board, Executive Director, and Development Staff are "on the same page." **0 1 2 3 4 5**

- Does the Board conducts annual evaluations of the Executive Director, and has the process set agreed upon goals for the ED such that the campaign as among the ED's highest priorities?
- Has the ED job description and responsibilities has been re-evaluated in light of the Capital Campaign, and has some responsibilities has been re-assigned to other staff members to allow the ED significant time to work on the campaign?
- Has the ED and Board reviewed the organizational staffing structure to ensure that enough staff support is in place to run the campaign?
- Has there been a projected budgeting planning process to allocate additional resources to support Capital Campaign fundraising and possible additional staff?

- Does the Development Director, Board President, and Executive Director meet frequently to develop, coordinate, and execute the Campaign Plan?
- Is there a high degree of teamwork across different staff functions, and between Board and senior staff?

14) The Board is focused on its role in Capital Campaign Fundraising. **0 1 2 3 4 5**

- Does the Board review the Board's performance each year?
- Has the Board developed a plan to address the Board's weaknesses in its role to support fundraising?
- Is the Board aware of the Board's and Organization's strengths and weaknesses going into the Campaign, and has it developed plans to address weaknesses?
- Has the Board undergone training in Capital Campaign Fundraising?
- Is the Board nominating committee actively seeking Board member who can are experienced in and/or can support capital campaign fundraising?
- Are other Board Committees focused on their role in supporting the Capital Campaign planning, such as: The Board finance committee is actively working on methods for financing the construction project, the site committee working on construction plans, and so on?

NOTES:

Instructions: Circle a number from 0 to 5 for each statement:
0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

5. Infrastructure

15) The organization has important policies in place. **0 1 2 3 4 5**

- Do you have written Mission/Vision statements that have been adopted by the Board?
- Do you have anti-discrimination policies in place?
- Do you have a whistle-bowers policy, document storage and destruction policy, and conflict of interest policy in place as required by your 990?
- Do you have gift acceptance policies in place?
- Do you have naming rights policies in place?
- Do you have bequest and endowment policies in place?
- Does your organization subscribe to a code of ethics and the Donor Bill of Rights?

16) A strong development program is in place. **0 1 2 3 4 5**

- Do you have a development plan with realistic goals in place?
- Is there a Development Committee that is involved reviewing the Development Plan?

- Has annual giving increased over the past two or more years?
- Do you have an integrated development program (scholarship fundraising, special events, direct mail, foundation grants, Legacy Program, Alumni Outreach, etc.)?
- Is there a stewardship program in place?
- Is there a planned giving program in place?

17) The marketing and communications plan is in place. **0 1 2 3 4 5**

- Do you have marketing and communications plans developed or updated in the past three years?
- Is marketing for camp and fundraising well integrated and coordinated?
- Do your public relations efforts result in increased donations, volunteers, Alumni engagement, new campers and improved camper retention?

18) The Donor Data Base is in top condition. **0 1 2 3 4 5**

- Are all your stakeholder's contacts in one database system?
- Are almost all of the Camp's Alumni and Parent/Past Parent contact information in the donor database, up to date, and correct?
- Do you have data entry procedures in place?
- Do you have an adequate and up to date donor software system?
- Do you have one than one staff trained to use this system?
- Do you have support for this system provided by the software company?
- Do you have an internal IT department that understands this system?

19) The Donor experience has been improved. **0 1 2 3 4 5**

- Have you gone through a branding process?
- Have you reviewed and improved all appeal letters, thank you letters, and donor reports?
- Is every touch point with donors warm, emotional, evocative of camp, and inspiring?
- Have you planned for donor recognition that is meaningful, appropriate, and in keeping with camp's spirit or traditions?
- Have you reviewed and updated the website and do you measure the hits on the website?
- Do you regularly publish an annual report, newsletter and press releases?
- Do you communicate regularly with donors and Alumni?

NOTES:

Instructions: Circle a number from 0 to 5 for each statement:
0 = serious problem 1 = poor 2 = weak 3 = ok 4= strong 5 = goal completed

6. Proper Campaign Planning

20) The Organization has a Capital Campaign Plan. **0 1 2 3 4 5**

- Is the Capital Campaign plan appropriately detailed for each campaign phase?
    - Planning Phase
    - Leadership Phase
    - Quiet Phase
    - Public Phase
    - Celebration Phase
- Does the Campaign Plan include a project budget?
- Does it include a detailed time-line
- Does it include target fundraising goals that are realistic and specific?
- Does it indicate specific roles and responsibilities for each team member?
- Has the plan been reviewed and understood by each member of the team?
- Does it include a gift pyramid?

Campaign Readiness Evaluation

Tallying your score:

0 x _____= _________
1 x _____= _________
2 x _____= _________
3 x _____= _________
4 x _____= _________
5 x _____= _________

Total _________

Interpreting your score:
85-100 Your campaign is ready to launch immediately!
70-84 Some improvements are necessary.
55-69 Extensive preparation is essential to the success of your campaign.
0-54 Your agency is in serious need of re-organization before beginning a capital campaign.

Sample Donor Database Data Entry Standards – Camp Wonderful

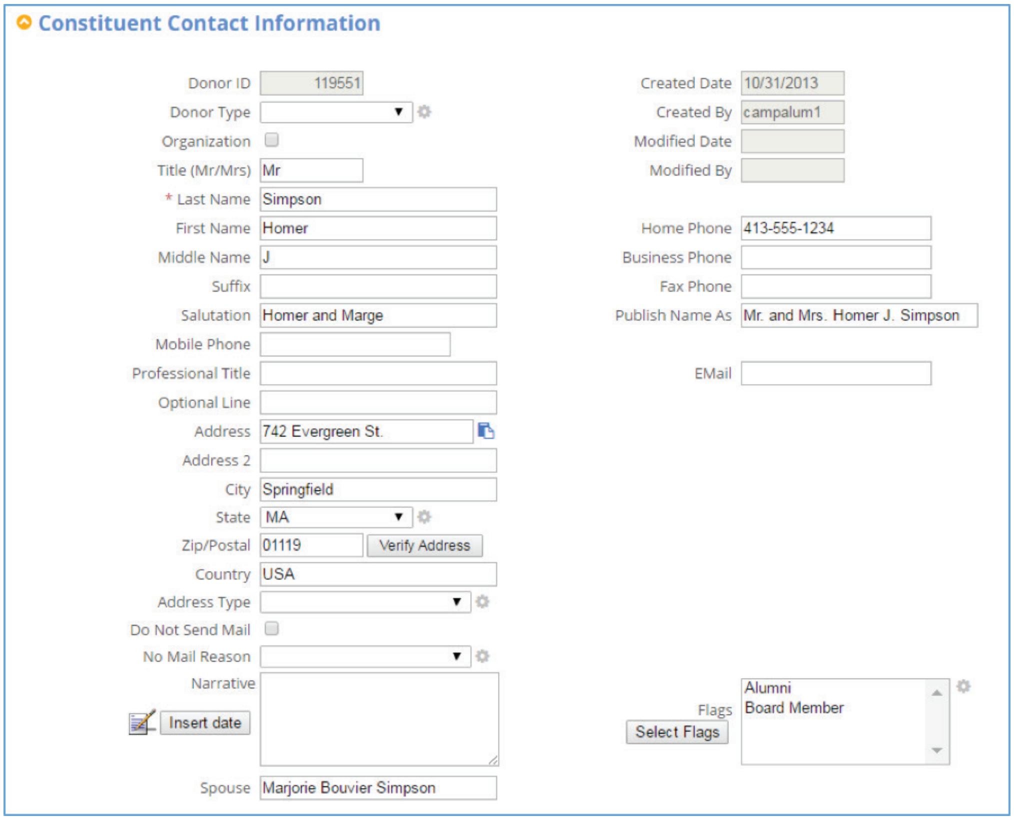
These standards have been defined to ensure data is entered consistently by all users of the system. For our data to be as useful as possible in our outreach and fundraising efforts, the data must remain as clean and consistent as possible. For example, if some alumni are not flagged as alumni, accurate alumni email/mailing lists cannot be created. If EVERY record does not have the Salutation field filled in completely, personalized emails or mailings cannot be created.
As our processes and requirements evolve over time, these standards may need to be revisited as well. If you have any questions about the standards or have ideas to improve them, contact our database manager or development director.

General Standards

- \- Only one record in the system for each person. Search for a person in the database to be sure they are not already there before entering a new record.
- \- Every household will have a single record in the database.
- \- When there are two adults in a household, the person most connected to camp will be designated the primary person on the record (i.e., the alum or the person who reached out to camp initially)
  - o The other partner's information must be entered in the Spouse/Partner fields on the Main tab in the database.
- \- Children information (if known) is to be entered in the Children fields on the Bio Tab.
  - o When children who have their own relationship to camp (alumni, former staff) turn 18, a separate record will be created for them. Use the Link functionality to connect the child to their parents.

Name Standards

- The first name field will include the person's legal name (if known). For example, "James" NOT "Jimmy"
- Nicknames will be used in the Salutation field (1). For example, "Jimmy" NOT "James"
  - The Salutation field will be used to personalize letters and emails.
  - For couples, the Salutation field will include both partners' nicknames (i.e., Marge and Homer) exactly how they would like it written at the top of their communications ("Dear Marge and Homer.")
- The most formal designation must be entered in the Publish Name As (2) field. For example, "Mr. and Ms. Homer J. Simpson." For a single person, it might read "Mr. Homer Simpson" or "Dr. Marge Simpson."
  - This allows envelope labels to be printed in bulk with no spreadsheet manipulation.



Constituent Contact Information

Donor ID	119551	Created Date	10/31/2013
Donor Type		Created By	campalum1
Organization		Modified Date	
Title (Mr/Mrs)	Mr	Modified By	
* Last Name	Simpson		
First Name	Homer	Home Phone	413-555-1234
Middle Name	J	Business Phone	
Suffix		Fax Phone	
Salutation	Homer and Marge	Publish Name As	Mr. and Mrs. Homer J. Simpson
Mobile Phone			
Professional Title		EMail	
Optional Line			
Address	742 Evergreen St.		
Address 2			
City	Springfield		
State	MA		
Zip/Postal	01119 Verify Address		
Country	USA		
Address Type			
Do Not Send Mail			
No Mail Reason			
Narrative Insert date		Flags Select Flags	Alumni, Board Member
Spouse	Marjorie Bouvier Simpson		

Address Standards

- Enter standard address abbreviations for all street addresses (in Address (3) field). For example, use:
  - "St." NOT "Street"
  - "Ave." NOT "Avenue"
  - "Blvd" NOT "Boulevard
  - "Dr." NOT "Drive"
- For State (4), always use the 2 letter Postal Abbreviation. For example, "NY" NOT "New York."
- For Country (5), use "USA" for the United States.

Flags (6)

Whenever a new constituent is entered, be sure they are flagged with all known designations. These flags are necessary for us to send segmented communications to our constituents.
For example:

- If the data is from an Alumni entry form on the website, or from an Alumni reunion, flag them as Alumni.

- If the data is from a list of current parents, flag them as Parent.
- If the constituent is a grandparent of a current or former camper, flag them as Grandparent.
- If you know the couple met at camp and are now married, flag them as Camp Couple.
- If they serve on the Board, flag them as Board Member.
- If they are currently (or formerly) a staff member, flag as Staff.
- Etc.

Do Not Mail (7)

- If a constituent requests to be removed from mailing lists, do NOT delete them from the database. Instead, check the "Do Not Mail" checkbox and select "Requested no mail" in the "Do Not Mail Reason" field.
- If a constituent passes away, check the "Do Not Mail" checkbox and select "Deceased" in the "Do Not Mail Reason" field.
    - Note: If the constituent has a partner in the record, simply move the partner information into the main fields, update the "Salutation" and "Envelope Name" fields, and put a note about the deceased in the "Notes" field.

Other Biographical/Contact Information Standards

- If a birthdate is known, enter it in the "Birthday" field. This allows us to segment our data by age. Use format MM/DD/YYYY
- Enter Phone numbers in format (###) ###-####

Gift Entry Data Standards

When entering a Gift, it is important to enter all data consistently so that we can prepare prompt, accurate thank you notes and analyze our fundraising efforts.

Note that you should check the donor's record before entering a gift to see if they have an outstanding pledge. If the new gift is actually a payment towards the pledge, be sure to go to the Pledge and click "Apply Payment" to ensure the pledge balance is updated correctly.

- **Reference (1):** Enter the Check # in the Reference field, where applicable.
- **GL_Code (2) (General Ledger Code):** Be sure to select the Fund where the money from the gift will be deposited. GL_Codes should match our bookkeeping funds 1:1. If any GL_Codes are missing, let the database manager or development director know ASAP.
- **Campaign (3):** Select the appropriate campaign for the particular gift. This could be a specific Capital Campaign, the Annual Campaign, a Scholarship Campaign, or other specific fundraising campaign.
- **Solicitation (4):** Select how the gift was solicited the most likely method the gift was asked

for. For example, if a gift comes in the mail with a stub from a mailing, select "Direct Mail." If the gift came via the basic online giving form, select "Online Giving." If the gift was solicited in-person, select "In Person." If the gift was received during camper registration, select "Camper Registration Form."

- **Split Gifts (5):** If the gift was a single check or online gift, but requested it be split to multiple Campaigns or Funds, use the Split Gift functionality to track where the contribution should be designated.
- **Soft Credits:** If the gift is actually a shared gift among more than one household in the system, it still can only be entered once in the database – on the record of the person who actually submitted the payment. However, the Soft Credit functionality should be used to ensure the gift is noted on each donor's record in the system, but the gift is only counted once for giving totals. After entering the gift, use the **Link Gift (6)** option to find the other people in the database to be included in the gift.