

A Data Eye for the Journalist Guy

By Gina VanderLoop, ROI Solutions

A friend of mine in charge of a large non-profit organization sent me an article the other day from the Chronicle of Philanthropy. The article was called “*How a Journalist’s Eye Can Improve Fund Raising*” and at its core, author Bob Levey highlighted how the world could be different if fundraisers would write more insightful visit reports. The friend said to me... “This is what we’re trying to do. It would be great if we could actually capture and store this information.” Well, I couldn’t resist with a lead-in question like that.

The Full Text of the Article can be found here: <http://philanthropy.com/premium/articles/v20/i08/08002101.htm> and it’s an excellent article every fundraiser should read.

I agree with Bob Levey. Most (if not all) donor visit reports are skimpy and therefore not terribly useful. But I’d take his argument a step further. Not only do we need to create more comprehensive donor reports with a journalist’s eye toward fundraising strategy, but we also need to provide meaningful placeholders for this information so that we can retrieve it and use it.

Below you’ll see the sample record we created for Bob’s Brooks Brothers-style potential donor (whom we fictitiously named Robert Johnson). We’ve entered in all of the basic information that would likely exist in the donor record prior to Bob’s visit (things like name, address, phone). We’re assuming Robert has already made some level of gift (or at least we’re assuming that the organization has already learned something about him to qualify him for a personal visit), but we can ignore the fact for the moment and come back to it later.

The Basics

At this point, we have only Robert’s basic record level contact information:

ACCOUNT ID	302962 (INDIVIDUAL)
Household Addressee	Mr. Robert B. Johnson & Mrs. Brenda L. Johnson
Household Salutation	Robert and Brenda
PRIMARY ADDRESS	MAILABLE (Residence Address / okay to use)
<input type="button" value="get map"/>	15 West Street
<input type="button" value="compose document"/>	Boston MA 02116
	USA
Districts	
Address Last Changed	02/13/2008 12:40:58 by GVL@DEMO
Head of household (#302962)	Mr. Robert B. Johnson
Primary Home Phone	(617) 555-1212
Cell Phone	(617) 123-6543
Primary Email	bjohnson@revolution.com
Web URL	https://revolution.roisolutions.com
Spouse (#302963)	Mrs. Brenda L. Johnson
ACCOUNT CLASS	Individual
Account Status	
Member Type	
Origination Vendor	User
Origination Vendor ID	

Since this article is university based (for a specific university), we have his education and we can add that information in:

Education		<input type="button" value="Add New"/>
▼ Mr. Robert B. Johnson — Head of household		
Institution	University of Memphis	<input type="button" value="edit"/> <input type="button" value="delete"/>
Level	College (Undergraduate)	
Graduated in	1974	
Degree	BS	

During the visit, Robert told Bob his age and that he grew up in Mississippi (in this case, we don’t know the exact birth date, but that can be added as well if it’s known):

PERSONAL STATUS	
Gender	Male <input type="button" value="v"/>
Age	54 <input type="button" value="v"/>
Birth date	1954 <input type="checkbox"/> only know the year
Birth city	Buxler <input type="button" value="v"/>
Birth county	Cumberland <input type="button" value="v"/>
Birth state	Mississippi <input type="button" value="v"/>
Birth country	USA <input type="button" value="v"/>
Date of death	mm/dd/yyyy <input type="button" value="v"/> <input type="checkbox"/> only know the year

We also know Robert runs a major PR firm. At this point, we can add his Public Relations Firm, Incorporated (the PR Firm) as its own record to the database and create a relationship between Robert's record and that of the PR firm. (We could also just add the PR firm as a separate address record, but this is more fun...)

Contacts in this account	Relationship	Related Contact
Account 302962 Mr. Robert B. Johnson & Mrs. Brenda L. Johnson <input checked="" type="radio"/> Head of household Mr. Robert B. Johnson <input type="radio"/> Spouse Mrs. Brenda L. Johnson	Advisee to financial planner Beneficiary to trust Boyfriend to boyfriend Brother to brother Brother to sister Business partner to business partner Campus to student Client to lawyer Client to stock broker Co-worker to co-worker	account <input checked="" type="radio"/> non-account <input type="radio"/> please select
<input type="button" value="assign relationship"/> <input type="button" value="cancel"/>		

We can now see (below) in Robert's record an existing relationship to the PR Firm. In this case, we chose the "Employee to Employer" relationship; however, relationship types are dynamic and (in reality) it's the client who chooses whatever relationship type makes the most sense for their organization.

Existing Relationships

▼ Mr. Robert B. Johnson (Head of household)
Employee to employer Public Relations Firm, Incorporated Mr. Robert B. Johnson (id 302964) X

While in Robert's records, we can link over to the PR Firm record:

ACCOUNT ID	302964 (ORGANIZATION)
Organization	Public Relations Firm, Incorporated
PRIMARY ADDRESS	MAILABLE (Business Address / okay to use)
<input type="button" value="get map"/>	15 Temple Street
<input type="button" value="compose document"/>	Boston MA 02116
	USA
Districts	
Address Last Changed	02/13/2008 14:01:50 by GVL@DEMO
Primary Contact (#302964)	Mr. Robert B. Johnson
ACCOUNT CLASS	CORPORATION
Account Status	
Member Type	
Origination Vendor	User
Origination Vendor ID	
Primary Contact — Mr. Robert B. Johnson	
Do not contact	Do not contact
Record added	02/13/2008 14:01:50
Full Name	Mr. Robert B. Johnson
Account Addressee	Mr. Robert B. Johnson
Account Salutation	Robert
Nickname	
Maiden name	
Professional Title	Chief Executive Officer

(Note: We marked this record as "Do Not Contact" because this record really shouldn't be used for contacts.) By adding the PR Firm as a record, we can track any time an employee or someone simply

connected to the PR Firm comes in contact with the organization.

Other Family Members?

Now we add Robert's family members to his account: both his wife and his daughter. At a later date, maybe when Jenny graduates, we can separate her off into her own record; but for now she's part of the family record.

ACCOUNT ID 302962 — ACCOUNT MEMBERS AND OVERALL STATUS					
Account Type	<input checked="" type="radio"/> Individual <input type="radio"/> Organization <input type="button" value="reset names"/>				
	prefix	first	middle	last	suffix
Head of household	Mr.	Robert	B.	Johnson	
Spouse	Mrs.	Brenda	L.	Johnson	
Daughter	Ms.	Jenny	J.	Johnson	
<input type="button" value="another contact"/>					
Household Addressee	Mr. Robert B. Johnson & Mrs. Brenda L. Johnson				
Household Salutation	Robert and Brenda				

And since Robert said that his daughter went to the same university, we went ahead and put her information in for education:

▼ Ms. Jenny J. Johnson — Daughter	
Institution	University of Memphis <input type="button" value="edit"/> <input type="button" value="delete"/>
Level	College (Undergraduate)
Graduated in	
Degree	BS

What else do we know?

Going back to the article, we know Robert gives to the Symphony and the Museum. Okay, let's put that into "Gifts to Other Organizations." If we know how much he gave and when, we can add that as well (under "Gift Type," "Method" and "Info Source") which can be very useful.

Gifts (to other organizations)

▼ Mr. Robert B. Johnson — Head of household					
GIFT RECIPIENT	GIFT AMOUNT	GIFT DATE	GIFT TYPE	GIFT METHOD	INFO SOURCE
The Symphony			Donation	One-time payment	Self Reported
The Museum			Donation	One-time payment	Self Reported

Robert's mother (Margaret Johnson) also graduated from the university, so we created a relationship link between Robert and his mother, as well as between Jenny (Robert's daughter) and Margaret (Jenny's grandmother).

Existing Relationships

▼ Mr. Robert B. Johnson (Head of household)	
Employee to employer	Public Relations Firm, Incorporated Mr. Robert B. Johnson (id 302964) X
Son to mother	Margaret Johnson (id 191727) X
▶ Mrs. Brenda L. Johnson (Spouse)	
▼ Ms. Jenny J. Johnson (Daughter)	
Grandchild to Grandparent	Margaret Johnson (id 191727) X

And, of course, we noted the education in Margaret's own record:

Education

▼ Margaret Johnson — Head of household Add New

Institution	University of Memphis	edit	delete
Level	College (Undergraduate)		
Graduated in	1962		
Degree	BA		

While in Margaret's record, we can view her relationships:

Existing Relationships

▼ Margaret Johnson (Head of household)	
College friend to college friend	Mrs. Susan M Berseth (id 302967)
Grandparent to Grandchild	Ms. Jenny J. Johnson (id 302965)
Mother to son	Mr. Robert B. Johnson (id 302962)

In viewing Margaret's relationships, let's say we happen to notice that Susan Berseth is a college friend of Margaret's. If we click on that, we can see Susan's relationships and, low and behold, we see that Susan Berseth is Kate Berseth's mother. Wow. Small world.

Because of these three primary relationships in Robert's record, I can use the Relationship Tree to view all of the connections:

Relationship Tree

type	account	name	relati
👤	302962	Mr. Robert B. Johnson	Head of hous
👤	191727	Margaret Johnson	Mother to son
👤	302967	Mrs. Susan M Berseth	College friend friend
👤	462	Mrs. Kate M. Berseth	Daughter to m
👤	463	Mr. Steve McNulty	Spouse
👤	300745	Mr. Tom Terrific Jr.	Son
👤	472	Matthew A. Rosen	Lawyer to clie
👤	981	Dr. Robert N. Pumpkin	Fraternity brot brother
👤	982	Mrs. Roberta W. Pumpkin	Spouse
👤	73254	Harvey Lappen	Client to lawy

We have a bit more information about Robert's wife, Brenda L. Johnson. She's the second name on the account within ROI, but that doesn't prevent us from adding specific attributes to her record:

Spouse — Mrs. Brenda L. Johnson	
Do not contact	Okay to contact
Record added	02/13/2008 12:40:58
Full Name	Mrs. Brenda L. Johnson
Account Addressee	Mrs. Brenda L. Johnson
Account Salutation	Brenda
Nickname	
Maiden name	
Professional Title	Lawyer
PERSONAL STATUS	
Gender	Female
Age	
Birth date	
Birth city	Boston
Birth county	Middlesex
Birth state	Massachusetts
Birth country	USA
Date of death	
CONTACT DEMOGRAPHICS	
Social security number	
Voter id	
Voter registration date	
Vote count	
Political affiliation	
PAC Employer	The Tax Law Corporation
PAC Occupation	Lawyer
Religious Affiliation	
Ethnicity	
Origination vendor	

And just like we did with Robert's company, we can add Brenda's company (Tax Law Corporation) as a separate record and create a relationship between the records:

▼ Mrs. Brenda L. Johnson (Spouse)	
Employee to employer	The Tax Law Corporation Mrs. Brenda L. Johnson (id 302966) X

At this point, we've been able to enter all of the pertinent information from the first part of Bob's visit with Robert into the donor record in a meaningful way. But we know that the anecdotal information contained in Bob's complete narrative paints a great picture of Robert, and therefore could be useful during a future visit. So we attach the complete narrative visit notes *directly* to "Robert Johnson's Comments" as a "Meeting Note." This way, we get the best of both worlds.

Comments display by date earliest first after

contacted by Bob Levey

member Mr. Robert B. Johnson

date 02/13/2008

category Meeting Notes/Comments

access -- all users --

subject **Notes from Meeting**

The other day, near the university where I teach and raise money, I met with a potential donor for breakfast.

He runs a major public-relations firm. He dresses Brooks Brothers-style, smiles easily, and talks about art as readily as 401(k)'s. Now that he's over 50, he chooses one of those impossible-to-open packets of raspberry jam for his toast rather than butter.

He likes jazz. He's learning Russian. He bakes brownies for his mother.

We connected easily and solidly. We parted with handshakes and an exchange of business cards. He might well turn out to be a fund raiser's dream - a donor himself as well as a bird dog for dozens more.

He was a museum and symphony donor. One of his daughters was a student at the university (she hopes to join the family business on graduation). His mother had graduated from the university. He didn't quite live and die over the fortunes of the basketball team, but he admitted that when he is sitting alone in a hotel room in Tokyo or Zagreb or the many other places he travels on business, he will always check online to see if the city won

Major Gifts Projects

Edit existing record 208

Member Mr. Robert B. Johnson

Project type 1 - Identification

Project purpose Annual Fund

Project priority High Priority

Project rating \$250K-\$499K

Start date

End date

Projected amount

Actual amount

Completion status [none]

Completion date

We can start to assign specific actions to be taken here for follow up or further cultivations. And these actions can be assigned to others. In this example, we made an assignment back to Bob himself to make a phone call to invite Robert to a private reception...

We're now beginning to create a full picture of Robert on file. So let's talk about the future – the fundraising strategy part of this article.

Major Gifts Projects

▼ Mr. Robert B. Johnson — Head of household

PROJECT TYPE	PURPOSE	START DATE	END DATE	COMPLETION DATE	COMPLETION STATUS
▼ 1 - Identification	Annual Fund	02/13/2008			
	action	responsible person	status	target	actual
<input type="button" value="edit"/>	Make Phone Call	Primary MG Solicitor Mr. Bob L. Levey	Planned	04/08/2008	
Invite Robert to the April Public Meeting. The University President will be hosting a private reception that evening to go thru our overall academic challenges.					
<input type="button" value="add new action item"/>					

Fundraising Strategies into Actions

Taking the strategy part of Bob's article, a bird-dog fundraiser is going to try to pinpoint the best target in Robert's record on which to base a direct ask for money. But Bob also talks about cultivation strategies that might encourage a better relationship between the organization and the potential donor before an ask is even made. There are many possible strategies here – probably too many to target for one ask, but they are all useful and should have a unique place in the database (instead of simply being added as an amorphous note to the record).

Bob Levey says: *Raspberry jam, not butter. Careful about his health. Must be thinking about staying vigorous and active. Probably not easy to persuade him to make a planned gift.*

Bob Levey says: *Brooks Brothers-style shirt. Says to me that he's comfortable with being establishment. Probably best to steer him toward making a gift for traditional academic areas rather than something too experimental or esoteric.*

In this case, we might keep this as a visit report narrative – in other words, we wouldn't set up anything that specifically says "don't approach him for a planned gift." The absence of a project on Planned Giving would imply it.

Even though we may not record his actual style of dress in the database, there's a nugget in here about a gift for traditional academic areas. We just happen to have such a Campaign going on in our nonprofit demo organization. Let's call it the Annual Fund (in reality, this is controlled by the organization).

Bob Levey says: *Brownies for his mother. Close relationship. Might he be able to influence her to make a planned gift? Might he influence her to make an outright gift? Both?*

Okay, let's put a few Solicitors in the Mother's record: Bob Levey, our fictitious fundraiser who did the visit and wrote up these notes/article. And just because Bob is a board member (who's not likely to do things like enter data into the database or do research), we're going to create an account steward (the staff person) Delta Donohue on the account as well.

Assignment

▼ Margaret Johnson — Head of household

Primary MG Solicitor	
02/13/2008 to present	Mr. Bob L. Levey
Account Steward	
02/13/2008 to present	Delta Donohue

And let's create a Planned Gift Project for Margaret. We will put her in reserve for the moment, because we're not quite ready to approach her directly.

Major Gifts Projects

Edit existing record 209

Member	▼ Margaret Johnson
Project type	▼ 0 - In Reserve
Project purpose	▼ Planned Gift
Project priority	▼ Medium Priority
Project rating	▼ [none]
Start date	02/13/2008
End date	mm/dd/yyyy
Projected amount	
Actual amount	
Completion status	▼ [none]
Completion date	mm/dd/yyyy

save delete cancel

Once we have a project set up (in this case one on Planned Giving — but again it could be whatever is most meaningful to you), we can start creating specific actions. Below is a specific action assigned to Delta Donohue (our wonderful staff person) to do some donor research. (Note: Action types are also dynamic to the organization). These actions are tied to ticklers and reminders, so Delta will be able to see her assignments and tasks. You can always add more actions as needed.

Major Gifts Projects

▼ Margaret Johnson — Head of household

PROJECT TYPE	PURPOSE	START DATE	END DATE	COMPLETION DATE	COMPLETION STATUS										
▼ 0 - In Reserve	Planned Gift	02/13/2008													
<table border="1"> <thead> <tr> <th>action</th> <th>responsible person</th> <th>status</th> <th>target</th> <th>actual</th> </tr> </thead> <tbody> <tr> <td>Donor Research</td> <td>Account Steward Delta Donohue</td> <td>Planned</td> <td>03/15/2008</td> <td></td> </tr> </tbody> </table> <p>Let's find out more about Margaret. Brownies for his mother. Close relationship. Might he be able to influence her to make a planned gift? Might he influence her to make an outright gift? Both?</p>						action	responsible person	status	target	actual	Donor Research	Account Steward Delta Donohue	Planned	03/15/2008	
action	responsible person	status	target	actual											
Donor Research	Account Steward Delta Donohue	Planned	03/15/2008												

+ add new action item

Bob Levey says: *The pronunciation of "public relations." Clearly has a sense of the larger society. Could he be steered toward establishing a professorship in public affairs?*

Since these are specific program strategies, we can certainly go ahead and create specific projects and actions under each area just like we did in the examples above. And it's likely in a university setting that there would be a program already defined for approaching people for a professorship. In that case, we could simply

create a program within Robert's record with a "Status of Planned" or "Cultivation" with specific and assigned actions within the project.

Here's what that could look like as an example:

Major Gifts Projects

Add New

▼ Mr. Robert B. Johnson — Head of household

PROJECT TYPE	PURPOSE	START DATE	END DATE	COMPLETION DATE	COMPLETION STATUS																											
▼ 1 - Identification	Annual Fund	02/13/2008																														
▼ 3 - Cultivation	Professorship																															
<table border="1"> <thead> <tr> <th>action</th> <th>responsible person</th> <th>status</th> <th>target</th> <th>actual</th> </tr> </thead> <tbody> <tr> <td>Write Letter</td> <td>Primary MG Solicitor Mr. Bob L. Levey</td> <td>Planned</td> <td>02/29/2008</td> <td></td> </tr> <tr> <td colspan="6">Send Bob materials on the University's Professorship Program - NO ASK, just a general informational letter.</td> </tr> <tr> <td>Make Phone Call</td> <td>Primary MG Solicitor Mr. Bob L. Levey</td> <td>Planned</td> <td>05/14/2008</td> <td></td> </tr> <tr> <td colspan="6">Invite Bob to Seminar on Professorship Programs.</td> </tr> </tbody> </table>						action	responsible person	status	target	actual	Write Letter	Primary MG Solicitor Mr. Bob L. Levey	Planned	02/29/2008		Send Bob materials on the University's Professorship Program - NO ASK, just a general informational letter.						Make Phone Call	Primary MG Solicitor Mr. Bob L. Levey	Planned	05/14/2008		Invite Bob to Seminar on Professorship Programs.					
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+ add new action item

Bob Levey says: *His wife's career. Since he mentioned her — and it — with such obvious pride, his wife should be part of all future fundraising discussions. Maybe their career interests could be blended into a lecture series in the law school about public service.*

Since we've already put Robert's wife (Brenda) directly into his record, we noted her account (and any associated data attributes) within her record and made sure that the salutations and household names include her name as well as his. This means that any mailings or contacts sent to this household will include Brenda's name as well as Robert's.

Bob Levey says: *Southern pride. He could be asked to serve on an advisory board that plans an annual colloquium to study Southern culture. If he agrees, this might be the way to get him interested before anybody prematurely asks him for a big donation.*

By way of demonstration, we just went ahead and put Robert on that board in our database. Notice (below) that we can stipulate effective and end-dates, as well as an automatic removal dates if appropriate. At this level, we can also assign a flag that's specific to this record/entry if we need to track additional information.

Mr. Robert B. Johnson — Head of household

Board Category	Advisory Board
Active?	Yes
Committee Name	Annual Colloquium to study Southern Culture
Role	Member at Large
Effective date	
End date	
Removal date	
Flags	

Bob Levey says: *Likes art, likes jazz. One of the toughest gifts to raise is support for summer internships for painters and musicians. Maybe this is the guy.*

Again, we can create a project specific to Robert in which the aim is to explore his potential support to fund summer internships (again, as a cultivation item) just like we did in the examples above. At the very least, we want to track Robert's interests in our demographics section, because that will give us the ability to set up demographic flags in ways that are meaningful and specific to the organization. We can create a generic category called "interests," or we can narrow it as we did below:

Demographics

- ▼ Mr. Robert B. Johnson (Head of household)
 - INTERESTS ART (Art)
 - INTERESTS JAZZ (Jazz Music)
 - LANGUAGES SPOKEN RUSSIAN (Russian)

Bob Levey says: *Learning Russian. Graduate students who want to attend professional conferences often can't do so because travel costs are so daunting. Underwriting conference costs for one or two students might get this prospect into the fund-raising slipstream slowly and comfortably — especially if the students report back to him in Russian.*

Demographics

- ▼ Mr. Robert B. Johnson (Head of household)
 - LANGUAGES SPOKEN RUSSIAN (Russian)

Ditto from the sections above on tracking this information.

We can put the full text of Bob's Fundraising Strategies into the "Research Notes" section within Robert's record which is viewable and printable. As we did above, Bob's strategies can also go into the notes section, but since we consider them "strategic," we felt they were perhaps more appropriate here. Notice that access is restricted to only those members in the Major Donor Group. By limiting access to Robert's record, we provide a little extra security while we're thinking about possible approaches with this donor.

Research Notes

Category: Fundraising Strategies

note by: Gina M. VanderLoop

member: Mr. Robert B. Johnson

date: 02/15/2008

access: Major donor group

subject: Fundraising Strategies

text: Notes from Meeting:

edit: Let's take another look at my breakfast with the public-relations man, and see how a reporter's observations might point the way toward a fund-raising strategy.

Brooks Brothers-style shirt. Says to me that he's comfortable with being establishment. Probably best to steer him toward making a gift for traditional academic areas rather than something too experimental or esoteric.

Raspberry jam, not butter. Careful about his health. Must be thinking about staying vigorous and active. Probably not easy to persuade him to make a planned gift.

Brownies for his mother. Close relationship. Might he be able to influence her to make a planned gift? Might he influence her to make an outright gift? Both?

The pronunciation of "public relations." Clearly has a sense of the larger society. Could he be steered toward establishing a professorship in public affairs?

His wife's career. Since he mentioned her - and it - with such obvious pride, his wife should be part of all future fund-raising discussions. Maybe their career interests could be blended into a lecture series in the law school about public service.

Southern pride. He could be asked to serve on an advisory board that plans an annual

When we step back and look at Robert's record in Revolution, we realize that we have a lot of information on him (notice the filled in check boxes going down the left hand tree-view navigation):

solutions (Demo)

General

- account
- addresses
- aliases
- benefits
- board activity
- comments
- contact history
- demographics
- donations
- education
- email
- flags
- memberships
- phone
- pledges
- pledge payments
- profile report
- published name
- relationships
- summary of gifts
- tickler
- volunteering
- wealth engine

Secure Payment

- credit cards
- eft (checking)

Major Gifts

- assignment
- project plans
- research notes
- 3rd party gifts
- donor holdings
- donor ratings

Planned Giving

Overlay Data

ACCOUNT ID: 302962 (INDIVIDUAL)

Household Addressee: Mr. Robert B. Johnson

Household Salutation: Robert and Brenda

PRIMARY ADDRESS: MAILABLE (Residence)

get map: 15 West Street

compose document: Boston MA 02116

USA

Districts

Address Last Changed: 02/13/2008 12:40:00

Head of household (#302962): Mr. Robert B. Johnson

Primary Home Phone: (617) 555-1212

Cell Phone: (617) 123-6543

Primary Email: bjohnson@revolution.com

Web URL: https://revolution.com

Spouse (#302963): Mrs. Brenda L. Johnson

Daughter (#302965): Ms. Jenny J. Johnson

ACCOUNT CLASS: Individual

Account Status

Member Type

Origination Vendor: User

Origination Vendor ID

Head of household — Mr. Robert B. Johnson

Do not contact: Okay to contact

Record added: 02/13/2008 12:12:00

Full Name: Mr. Robert B. Johnson

Account Addressee: Mr. Robert B. Johnson

Account Salutation: Robert

Nickname

Maiden name

Professional Title

PERSONAL STATUS

Gender: Male

Age: 54

Constructing a Big Picture View

Using the ROI Profile Builder, I can set up a view for this record and select the items and order in which I want to see them. This view can also be printed and given to people as a more comprehensive visit report – or as information leading into a follow up visit/meeting with this donor.

Element	Order
<input checked="" type="checkbox"/> General account: Flags Display <input checked="" type="checkbox"/> suppress if there are no flags	1
<input checked="" type="checkbox"/> General account: Account Display No options for this element.	2
<input checked="" type="checkbox"/> General addresses: Address Display <input checked="" type="checkbox"/> suppress empty addresses <input checked="" type="checkbox"/> suppress empty lines	3
<input checked="" type="checkbox"/> General benefits: Benefits No options for this element.	4
<input checked="" type="checkbox"/> General comments: Comments Display format: <input type="text" value="display by date"/> Display order: <input type="text" value="most recent first"/> Only after: <input type="text" value="mm/dd/yyyy"/> Max number of items to display: <input type="text" value=""/> <input type="checkbox"/> open any attached documents	5
<input checked="" type="checkbox"/> General contact history: Contact History Filter by contact type: <input type="text" value="[All Contact Types]"/> Max number of rows to display: <input type="text" value=""/>	6
<input checked="" type="checkbox"/> General donations: Donation Transactions Filter donations from <input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/> (blank for all) <input type="checkbox"/> include reversals <input type="checkbox"/> include relateds Max number of rows to display: <input type="text" value=""/>	7
<input checked="" type="checkbox"/> General donations: Donation Summary No options for this element.	8
<input checked="" type="checkbox"/> General education: Education No options for this element.	9
<input checked="" type="checkbox"/> General email: Email Details <input checked="" type="checkbox"/> suppress unused record types <input checked="" type="checkbox"/> suppress empty detail lines	10

<input checked="" type="checkbox"/> Major Gifts assignment: Major Gifts Officers No options for this element.	22
<input checked="" type="checkbox"/> Major Gifts 3rd party gifts: Gifts (to other organizations) No options for this element.	23
<input checked="" type="checkbox"/> Major Gifts donor holdings: Holdings No options for this element.	24
<input checked="" type="checkbox"/> Major Gifts donor ratings: Ratings No options for this element.	25
<input checked="" type="checkbox"/> Major Gifts project plans: Major Gifts Projects No options for this element.	26
<input checked="" type="checkbox"/> Major Gifts research notes: Research Notes Display format: <input type="text" value="display by category"/> Display order: <input type="text" value="most recent first"/> Only after: <input type="text" value="mm/dd/yyyy"/> Max number of items to display: <input type="text" value=""/> <input type="checkbox"/> open any attached documents	27
<input checked="" type="checkbox"/> Planned Giving status: Membership Info No options for this element.	28
<input checked="" type="checkbox"/> Planned Giving pg projects: Planned Giving Projects No options for this element.	29
<input checked="" type="checkbox"/> Audit merge activity: Merge Activity Max number of rows to display: <input type="text" value=""/>	

Managing the Approaches

Actually entering data into a database isn't the problem. The challenge for nonprofit organizations is to create a database that provides logical placeholders for all the vital information you're able to collect. Ultimately, it's the access to your vital information that matters, because we only put data into a database in order to do something valuable with it later on.

Enter the ROI Revolution Major Gifts Console.

Throughout the set up of this record and its associated data attributes, we've made specific projects and actions for people to take as examples. Those people ("solicitors") can login and view specific actions that have been assigned to them in this process.

Here is Bob's Action Items as an example:

ROI ID	DONOR NAME	DONOR LAST NAME	TASK STATUS	SCHEDULED	PROJECT	PROJECTED AMOUNT	ACTION	STATUS	NOTES
302962	Mr. Robert B. Johnson	Johnson	FUTURE	02/29/2008	Type: 3 - Cultivation Purpose: Professorship Rating: Priority: Medium Priority		Write Letter	Planned	Send Bob materials University's Professorship Program - NO ASK, general information letter.
302962	Mr. Robert B. Johnson	Johnson	FUTURE	04/08/2008	Type: 1 - Identification Purpose: Annual Fund Rating: Priority: High Priority		Make Phone Call	Planned	Invite Robert to the Public Meeting. The University President hosting a private re that evening to go t overall academic challenges.
302962	Mr. Robert B. Johnson	Johnson	FUTURE	05/14/2008	Type: 3 - Cultivation Purpose: Professorship Rating: Priority: Medium Priority		Make Phone Call	Planned	Invite Bob to Semir Professorship Progr

And here is Delta Donohue's:

Action Items [all project types] [all incomplete action items] [all task statuses] Delta Donohue

Displaying records 1 to 2 of 2. [EXPORT] [SAVE FLEXLIST] [CUSTOMIZE]

ROI ID	DONOR NAME	DONOR LAST NAME	TASK STATUS	SCHEDULED	PROJECT	PROJECTED AMOUNT	ACTION	STATUS	NOTE
300980	Miss Ginger Pepper III	Pepper	FUTURE	03/14/2008	Type: 1 - Identification Purpose: Annual Fund Rating: \$500K-\$999K Priority: Medium Priority		Personal Visit	NOT COMPLETED	Go introdu Ms. Pepp
191727	Margaret Johnson	Johnson	FUTURE	03/15/2008	Type: 0 - In Reserve Purpose: Planned Gift Rating: Medium Priority		Donor Research	Planned	Lets find c about Mar Brownies f Close relat Might he t influence l planned g influence l an outrigh

Displaying records 1 to 2 of 2. [EXPORT] [SAVE FLEXLIST] [CUSTOMIZE]

Both of these individuals will get reminders on their actions. This console also gives you the ability to set up delegates for other solicitors. This is particularly useful for some solicitors (board members) who may not have (or want) direct access to an organization's database. In such cases, "delegates" can be set up to manage the actions on their behalf, even though the board member may, in fact, be the one to do the action. In addition, since we are The Boss in this fictitious world, we can view their action items as well. We can also see the list of solicitors and how many accounts they are responsible for (by "Role" or Solicitor Type) and hyperlink over to their accounts.

Solicitor List

Displaying records 1 to 25 of 41. [EXPORT]

NAME	ROI ID	SOLICITOR TYPE	
Admiral Theodosius T. Halsey Jr.	300060	Account Steward	1
Cantor Marietta Kahlua	544	Account Steward	1
Delta Donohue	281879	Account Steward	2
Delta Donohue	281879	Primary MG Solicitor	2
Delta Donohue	281879	Secondary Solicitor	2
Dr. James J Johnston	300918	Primary MG Solicitor	2
Dr. Leonardo Rosenfeld	923	Secondary Solicitor	1
Dr. Michael Rozen	764	Primary MG Solicitor	1
Dr. Prosper G. Murciano	3829	Primary MG Solicitor	1
Dr. Sinclair M. Scala	4957	Primary MG Solicitor	1
Eugenie N Hobbs	300693	Primary MG Solicitor	2
Garland Auton	288451	Account Steward	1
Garland Auton	288451	Primary MG Solicitor	3
Ginger Thompson	300722	Primary MG Solicitor	1
Jaleh Kashanian	65111	Primary MG Solicitor	1
Matthew A. Rosen	472	Account Steward	3
Matthew A. Rosen	472	Primary MG Solicitor	4
Matthew A. Rosen	472		2
Mr. Bob L. Levey	302968	Primary MG Solicitor	2
Mr. David Piccirilli	471	Primary MG Solicitor	1
Mr. David Piccirilli	471	Secondary Solicitor	1
Mr. James Daley	5820		1

And since all of this data resides back in the database, we can extract it in other ways as well, such as through ad hoc queries or canned reports. But part of the beauty of an online system like ROI 's Revolution On-Line is that many of the necessary management tools can be created directly within the system itself, thereby making the management aspect of donor contacts and follow-up far more dynamic and interactive.

Major Donor Solicitor/Steward by Fiscal Year

[PDF] [Excel] [Word] [TAB]

Report Parameters

Database: HRC
 Report File: MD_Solicitor_by_FY.jsp
 Client: Human Rights Campaign
 Select by: Solicitor Notificant (Steward)
 Solicitor or Steward ID (optional):
 Fiscal Year (YYYY):
 Goal (\$\$) for Solicitor(s) or Steward(s): 50000

run email schedule...

Subject: ROI Reports -- Major Donor Solicitor/Steward by Fiscal Year
 Distribution: gvanderloop@roisolutions.com
 (separate multiple addresses with commas)

About This Report

This is a detailed listing of Major Donor members, grouped by their Major Donor solicitor. The report includes Member Name and Address information, Primary contact (phone & email) information, Membership Level & Status, Pledge Status, Status, Amount, Payment Method, Total Amount Paid, Paid Through Date, Next Payment Date, Next Payment Amount and Frequency. The report is grouped by Major Donor solicitor and also included a summary of the solicitors goal and prog

Federal Club Council (Major Donor) members are determined by where the Aux String 2 value of their Membership Sub STATUS is FEDERAL CLUB COUNCIL and where their Membership Sub Status is Active.

Only Pledges with an Origination Code under Promotion B (Federal Club Council) are included in this report.

By using the Select by parameter the user can also run this report for Notificants (Stewards) instead of Solicitors.

Conclusion

Bob Levey is right, certainly. But having a more complete donor report itself isn't enough and never has been — though it's a step in the right direction.

It's not just a matter of the way we might be considering our potential donors; just as often, the major challenge is having to deal with a database that can't store unlimited and disparate information in a meaningful way. With most databases, if "certain fields" don't exist, you're told to create "User Defined Fields" which just end up being tacked on here and there and used inconsistently. And if that's the way you're storing your data, you might as well unplug all your desk lamps too, because you're just not seeing the whole picture. With Revolution On-Line, we allow you to see everything, so you can find what you're looking for.

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Bob Levey; *How a Journalist's Eye Can Improve Fundraising*, Chronicle of Philanthropy Vol #20 Issue #08 and on the web @ http://philanthropy.com/premium/articles/v20/i08/080021_01.htm

See also: *Major Gifts: A Database Primer for ROI Users*, September 2007, ROI Solutions.