

dp donorperfect

COMMUNITY CONFERENCE
SPARK





Hello, my name is Sean “Mac” McClellan

CONNECT WITH ME:



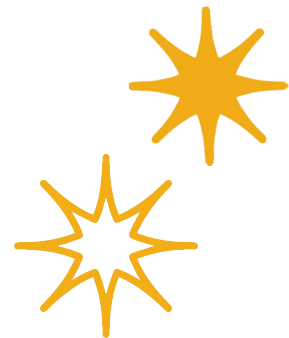
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<https://www.donorperfect.com/learning-center>



<https://www.linkedin.com/in/sean-mac-mcclellan>



Spark Healthier Decision-Making and Data Management

Or How I Learned to Stop Worrying and Love the Data!





Bad Data In, Bad Data Out!

Or Why Don't My Reports Show Me Anything *Useful!*?

Do Your Reports Look Like This?

General Ledger Analysis

01/01/1900 to 12/31/2099

GL Code ↕	No. Donors ↕	Avg/Donor ↕	No. Gifts ↕	Avg/Gifts ↕	Total Given ↕
	22	\$937.39	84	\$245.51	<u>\$20,622.59</u>
Annual Fund	505	\$2,875.46	6344	\$228.89	<u>\$1,452,106.65</u>
Building Fund	161	\$1,476.79	890	\$267.15	<u>\$237,763.05</u>
Building Fund	18	\$897.78	68	\$237.65	<u>\$16,160.00</u>
Capital Campaign	10	\$2,215.50	10	\$2,215.50	<u>\$22,155.00</u>
Membership	59	\$989.81	164	\$356.09	<u>\$58,399.00</u>
Unrestricted	53	\$720.23	132	\$289.18	<u>\$38,172.40</u>
GRAND TOTALS	828	\$10,112.96	7692	\$3,839.97	\$1,845,378.69
Actual Counts	570	\$3,237.51	7692	\$239.91	\$1,845,378.69

A total of 7 GL Code(s) Listed



Or Maybe Like This?



Solicitation Report

Code	Description	Mailed	# of Replied Donors	% of Responses	# of Gifts	Total Revenue	Total	Net Revenue	Total Revenue Per\$ Spent	Cost per1000	Revenue per1000	Goal	Variance(Total Revenue To Goal)	
													\$	%
						REVENUE	EXPENSES	RATIOS			GOAL			
NO CODE		0	73	0	406	<u>\$48,990.91</u>	\$0.00	\$48,990.91		N/A	N/A	\$0.00	\$48,990.91	
AA20	Annual Appeal 2020	425	60	14.12	132	<u>\$41,699.75</u>	\$495.00	\$41,204.75	\$84.24	\$1,164.71	\$98,117.65	\$12,500.00	\$29,199.75	233.60
ANNUALAPPEAL2020		0	4	0	14	<u>\$10,570.00</u>	\$0.00	\$10,570.00		N/A	N/A	\$0.00	\$10,570.00	
BOARD_DUES	Board_dues	0	4	0	4	<u>\$1,560.00</u>	\$0.00	\$1,560.00		N/A	N/A	\$0.00	\$1,560.00	
CC16_1ST	Capital Campaign 2016 1st Letter	0	2	0	2	<u>\$250.00</u>	\$0.00	\$250.00		N/A	N/A	\$0.00	\$250.00	
UN		0	1	0	1	<u>\$51.50</u>	\$0.00	\$51.50		N/A	N/A	\$0.00	\$51.50	
UNSO	Unsolicited	0	127	0	770	<u>\$120,559.96</u>	\$0.00	\$120,559.96		N/A	N/A	\$0.00	\$120,559.96	
Total:		425	271	63.76	1,329	\$223,682.12	\$495.00	\$223,187.12	\$451.88	\$1,164.71	\$526,310.59	\$12,500.00	\$211,182.12	

Or Perhaps Even... *Like This?*



Cross Tabulation Report

SOLICIT CODE by GL CODE

SOLICIT CODE	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum
	Annual Fund (AF)		Building Fund (BF)		Building Fund (BUILDINGFUND)		Capital Campaign (CAPITAL_CAMPAIN)		Membership (ME)		Unrestricted (UN)		Total			
	60	\$4,183.59	282	\$30,850.32	9	\$2,895.00	1	\$350.00	0	\$0.00	7	\$560.00	29	\$3,220.50	388	\$42,059.41
19GOTVP	0	\$0.00	8	\$175.00	2	\$130.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	10	\$305.00
2015FALLGALA	0	\$0.00	1	\$10.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$10.00
2018BRICK	0	\$0.00	2	\$510.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	2	\$510.00
2018DPCNC	0	\$0.00	1	\$300.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$300.00
2018ET	0	\$0.00	1	\$600.00	1	\$45.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	2	\$645.00
20th Anniversary Appeal (20YEAR)	0	\$0.00	117	\$91,305.00	19	\$932.50	1	\$5,000.00	0	\$0.00	0	\$0.00	0	\$0.00	137	\$97,237.50
50th Anniversary of Friends (50THFRIENDS)	0	\$0.00	61	\$15,025.00	3	\$245.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$5.00	65	\$15,275.00
AAA Crowdfunding 2019 (AAA19)	0	\$0.00	5	\$6,325.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$200.00	0	\$0.00	6	\$6,525.00
Adopt A Friend 2020 (ADOPT_A_FRIEND_20)	0	\$0.00	14	\$1,783.30	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	14	\$1,783.30
AGT2018	0	\$0.00	1	\$50.00	12	\$550.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	13	\$600.00
Total	84	\$20,622.59	6344	\$1,452,106.65	890	\$237,763.05	68	\$16,160.00	10	\$22,155.00	164	\$58,399.00	132	\$38,172.40	7692	\$1,845,378.69



What Causes Bad Data?

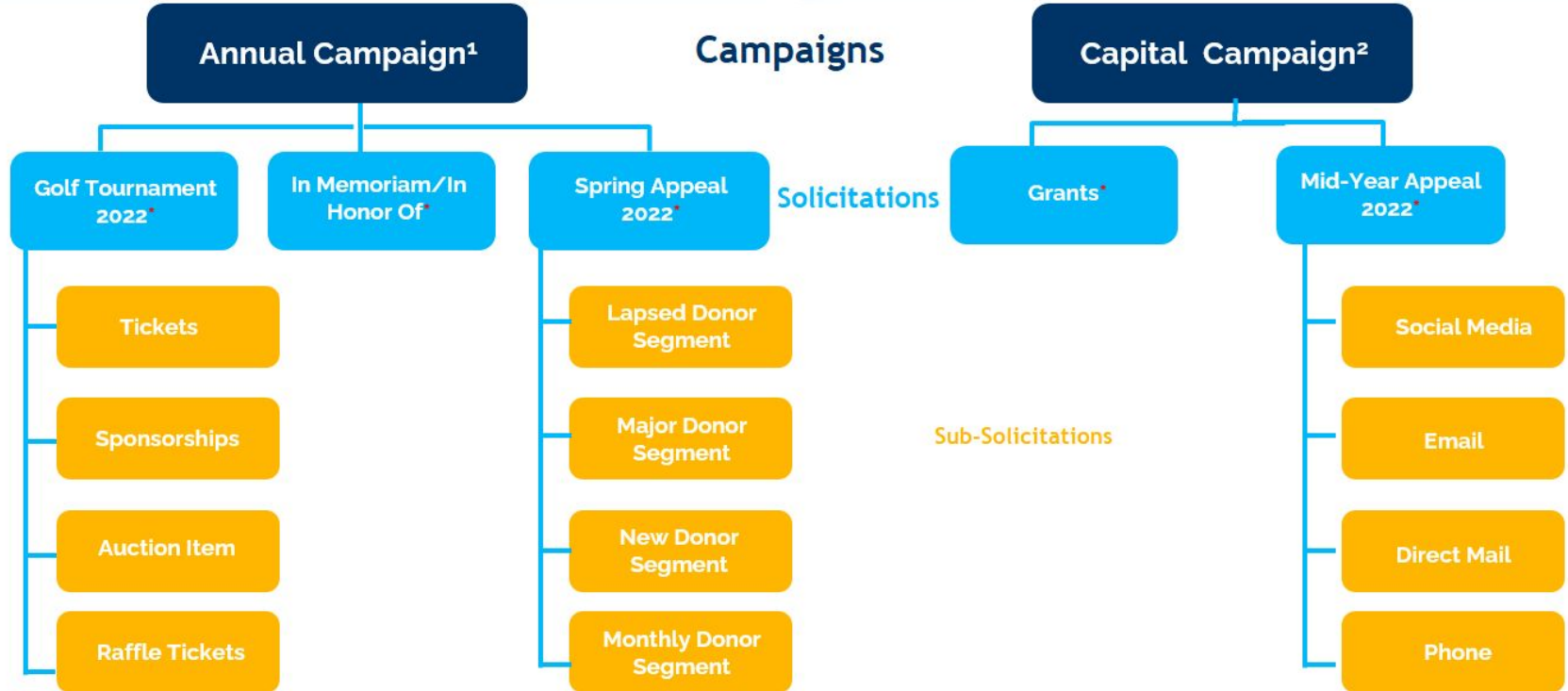
- Lack of Planning
- Miscommunication
- Employee Turnover
- The Donors



Setting Up Your Codes

Or How to Herd Those Digital Cats!

Sample Breakdown of Fundraising Codes



1 - The money raised by the Annual Campaign goes to the Unrestricted Fund.*

General Ledgers

2 - The money raised by the Capital Campaign goes to the Building Fund.*

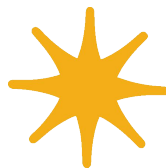
Essential Gift Codes

The Code:

- General Ledger
- Campaign
- Solicitation
- Sub-Solicitation
- Receipt/Thank You Template

Used For:

- Designation or Fund
- Fundraising Strategy
- Appeal or Event
- Segment or Item
- Thank You Message



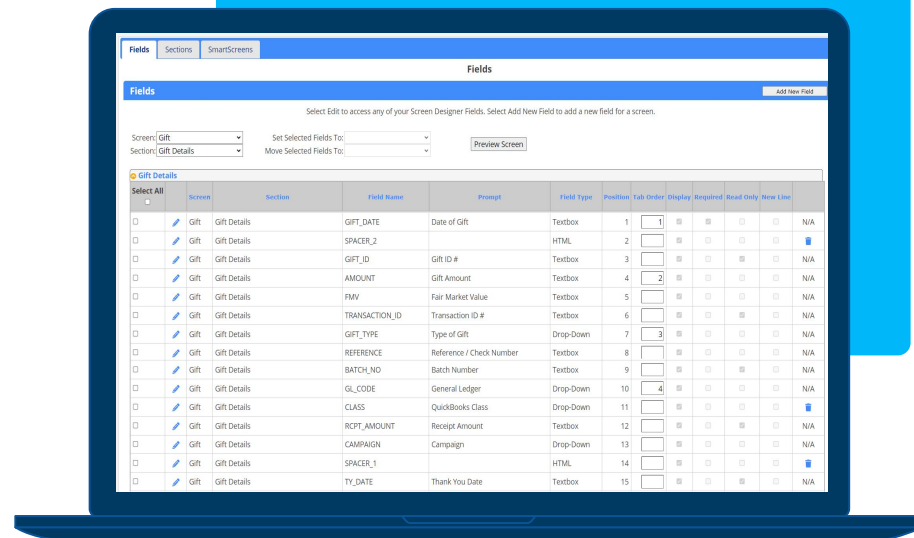


Screen Designer & Defaults


Or Making Your Database Work For You!

Setting Up Your Screens

- Adding New Fields
- Customizing Fields
- “Removing” Unwanted Fields
- Making fields *Required



Assigning Default Codes



A screenshot of a web form displayed on a laptop screen. The form contains several input fields with dropdown menus and a date picker. The fields are: Date of Gift (05/01/2024), Gift Amount (\$50.00), Type of Gift (Check), General Ledger (Annual Fund), Campaign (Annual Campaign 2024), Solicitation (Annual Appeal 2024), Sub Solicitation, and Thank You Template (Standard Thank You). Each dropdown menu has a blue checkmark icon and a plus sign icon to its right.

* Date of Gift	05/01/2024	📅
Gift Amount	\$50.00	
Type of Gift	Check	⌵ +
General Ledger	Annual Fund	⌵ +
Campaign	Annual Campaign 2024	⌵ +
Solicitation	Annual Appeal 2024	⌵ +
Sub Solicitation		⌵ +
Thank You Template	Standard Thank You	⌵ +

- System-Wide Defaults
- User-Specific Defaults



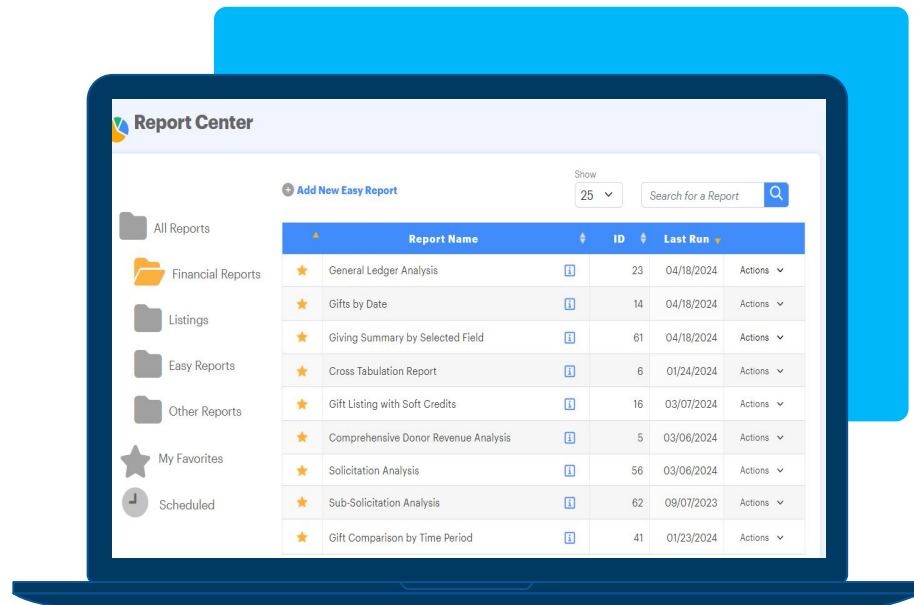


Key Financial Reports

Or Wow, Those Reports Are *So Useful!*

What Reports Should I Run?

- General Ledger Analysis Report
- Giving Summary By Selected Field
- Solicitation Analysis Report
- Cross-Tabulation Report
- Sub-Solicitation Analysis Report



Recap & Takeaways

- Have a plan for your annual gift codes.
- Hide unnecessary fields, mark important fields as required.
- Use Defaults to save time and improve data consistency.
- Run key reports to track your team's progress.





Q&A

A word cloud featuring the phrase 'thank you' in numerous languages. The most prominent words are 'thank you' in English, 'danke' in German, '謝謝' in Japanese, 'gracias' in Spanish, 'merci' in French, and 'شكراً' in Arabic. Other visible languages include Russian (спасибо, благодарю), Korean (고맙습니다), Hebrew (תודה), Hindi (धन्यवाद), and many others. The words are arranged in various sizes and orientations, creating a dense and colorful collage.