



# Database 101: Improve Your Donor Database for Fundraising Success

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Presented By: Tricia Marsherrall, Marsherrall Partners. LLC  
Tuesday, December 7, 2021 | 2:00 – 3:00 p.m.



# A little housekeeping...



*We're recording this webinar!*

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



*Feel free to ask questions!*

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



*We will be live-tweeting!*

Share your highlights and takeaways with the **#qgivwebinar** hashtag, and please make sure to follow **@Qgiv!**



We know the value of relationships and are proud to connect you with Marsherrall Partners, a member of our partner network.

Powerful Fundraising Technology + Donor Database Management



**Raise More, Manage Less**

**Donation Forms | Event Registration  
Text Fundraising | Peer-to-Peer | Auctions  
Integrations & Data**



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**Database Management | Fundraising  
Data Analytics | Fundraising  
Operations | Fundraising Events**

# Today's Speaker



## Tricia Marsherrall | Founder & President, Marsherrall Partners, LLC

Tricia Marsherrall is the Founder & President of Marsherrall Partners, LLC, a consulting firm specializing in nonprofit donor database management & operations support and virtual & traditional fundraising events. Tricia has worked in dozens of databases, analyzing hundreds of thousands of records and will share the lessons she's learned along the way.

# AGENDA

- Fundraising Landscape
- Common Database Roadblocks
- Tips to Leverage Your Data
- Your Data Challenge Speed Rounds
- Tools to Use Right Away
- Q&A

# \$471+B

CHARITABLE GIVING 2020




5% INCREASE OVER 2019

69%



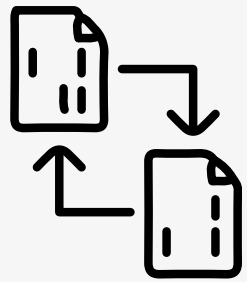
2018 - 2020 Cumulative Increase of 9.1%



While 90% of nonprofits collect data, just 5% “use data in every decision they make.”



# Causes of Your Data Nightmares



Database  
Conversions



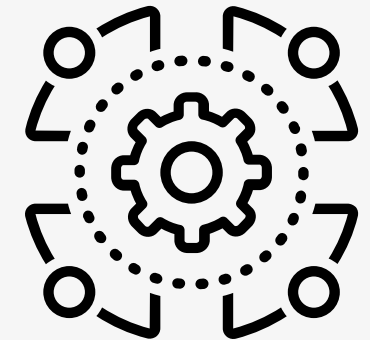
Data Entry  
Inconsistencies



Employee  
Turnover



Lack of  
Strategy



Multiple Systems  
Without Integration





# Benefits of Data Analysis



## Fundraising & Outreach

Identify prospects and target resources.



## Improve ROI & Increase Efficiency

Reduce expenses and improve ROI through data-informed decisions.

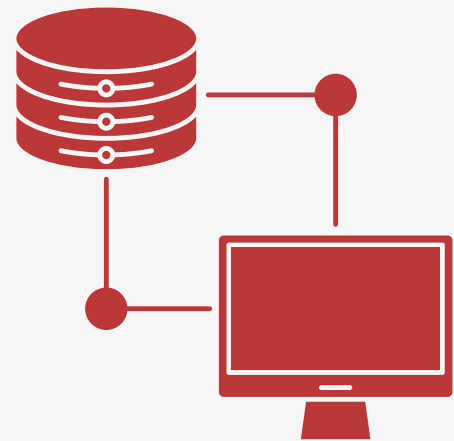


## Trust & Accountability

Build trust with donors & funders.



# Tips to Leverage Your Data



## Audit Your Database

Manage data in one location through systems integrations



## Standardize Data Entry

Document written data entry procedures and invest in training the team.



## Regular Reporting

Understand, track and analyze key donor metrics.



## Share Your Findings

Build trust with donors & funders by communicating your results. Combine data with anecdotal evidence.

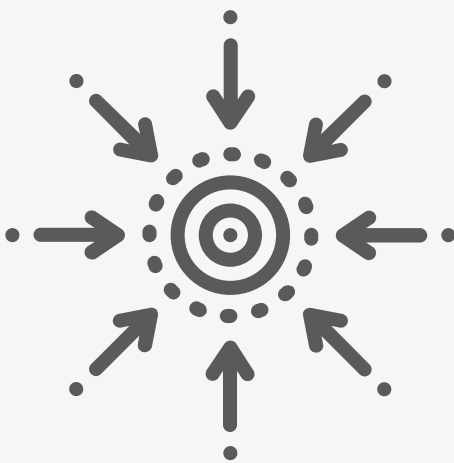
# 1

# Audit Your Systems



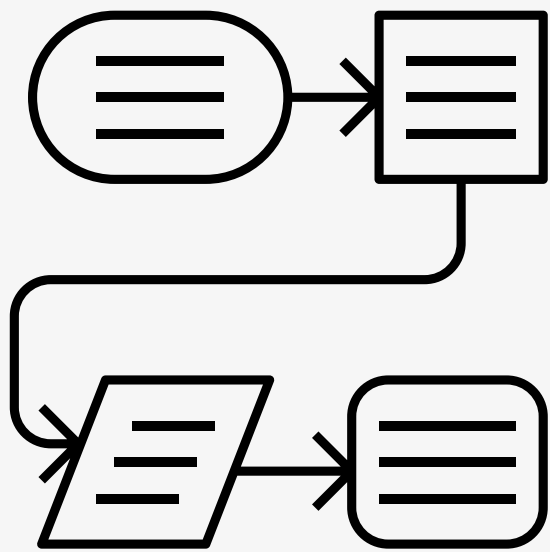
- Perform an internal audit of your systems. Think:
  - Donor database
  - Event database/tools
  - Spreadsheets/shadow databases
  - KPI/Dashboards
  - E-communication
  - Registrar/membership/grateful patient management
  - Volunteer management
  - Calendars
  - Gift officers

GOAL: CENTRALIZATION



# ② Standardize

Start with the basics!



- Create mandatory fields for data entry
  - Annual review user groups/rights and access
  - Batch gift entry
  - 1 SOP/month
  - Monthly data health checks
    - Financial reconciliation
    - Deceased records
    - Address updates
    - Constituent codes
- Most Common Data Issues:
- Tracking Campaigns, Funds, Appeals, Packages
  - Donor Acknowledgment Letter process
  - Difficulty comparing "apples to apples"
  - Prospect moves management & pipeline management

# ③ Regular Analysis & Reporting

## Monthly Reports

- Financial Reconciliation
- New Donors
- Increased Donors
- Donors at risk of lapsing

## Annual Reports

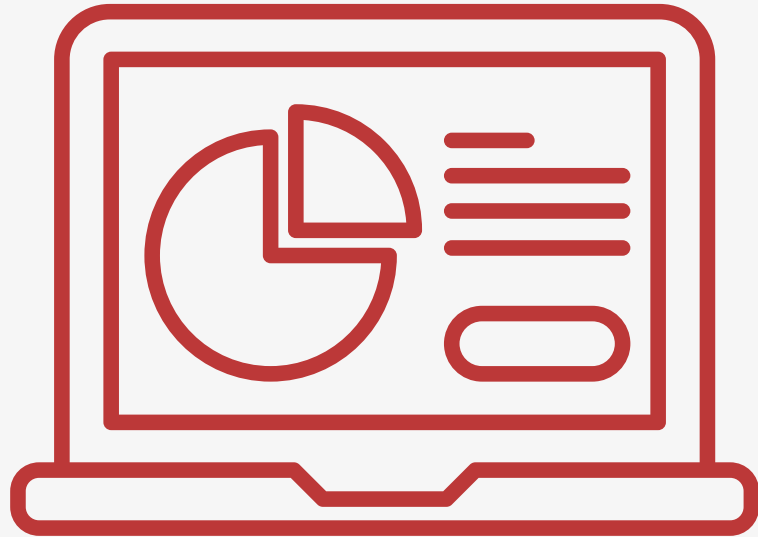
- Revenue breakdown by fundraising effort
- LYBUNT/SYBUNT
- Prospect Portfolio Review
- Portfolio pipeline

## KPI & Goals

- Appeal comparison & ROI
- Proposals/Solicitations
- Donor Engagement
- Leverage Dashboards

## Grant Metrics

- Align data collection with Grant Reporting requirements



④

# Share Your Results!



## Annual Reports

- Share your impact by combining your anecdotal stories with your data
- Communicate the impact of your donors' investment in your mission.

# Data Challenge Speed Rounds

Please submit your examples!



# Tools to Use Right Away

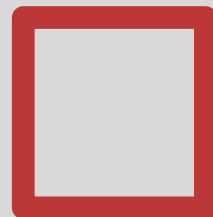
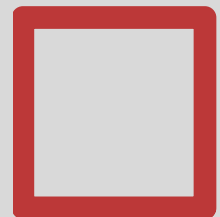
- 1) User groups & mandatory fields
- 2) Data Request Form
- 3) Batch entry and conditional mail merges
- 4) Data Road Map
- 5) LYBUNT Reports



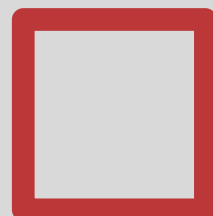
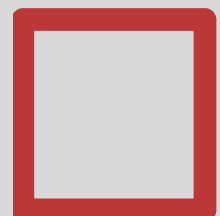
**THANK YOU & KEEP IN TOUCH!**



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# Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



# Thank you for joining!

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