

Data Analysis and Query Logic

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As a nonprofit, the generosity of your constituents is the lifeblood of your organization. On the technical side though, your database is the crux of your organization. Your database contains (or should contain) all of the information you need on a day to day basis. The information within your database allows for the ability to send out newsletters, invitations, thank you letters, run reports for the board and accountants, and even simply find a person's phone number. Getting the needed data into your database is the first important step. Being able to get it out, analyze it and put it to good use is the next step.

In order for you to effectively use your database you must be able to analyze the information that you have recorded. Analysis should not only include financial breakdowns but also evaluation of the accuracy of constituent records.

If your data is not clean then you will end up spending more time (and money) than necessary to accomplish your fundraising goals. On the constituent level there are several things to review to keep your database in good working order.

- Find constituent records that have blank or incomplete addresses.
 - Consider doing a NCOA (National Change of Address) process to clean up your addresses.
- Do you have constituents in your database that have never donated and have had no touches in the past 3 years?
 - Consider deleting these constituents since they are not beneficial to your fundraising goals.
- Do you have duplicate constituent records?
 - Merge duplicate records so that you are not sending multiple mailings to the same constituent.
- Do you have compound records, such as John and Mary Smith that should be split in to two separate records?
 - Separate records would make sense for instance, if you needed to track volunteer hours for one of the people, if one spouse has passed away, or if one of the constituents made a donation on their own.

Financial analysis and clean up is absolutely necessary in order to accurately report on and track your fundraising efforts. You should see the effectiveness of your fundraising efforts at a glance. Here are several areas to focus on.

- Lapsed donors
 - Who gave last year but not this year?

The image shows two overlapping windows from the LYBUNT Report software. The top window is the main report interface, and the bottom window is a preview of an email launch mail merge.

LYBUNT Report Interface:

- Filters:** Last Year, But Unfortunately Not (selected), This Calendar Year, This Fiscal Year, Since 09/30/2008.
- Report Title:** TowerCare Technologies, LYBUNT Report.
- Gifts received between 9/30/07 and 9/7/08:**
 - Acme Medical Equipment (890176):** 1105 Wiley Rd, Tempe, AZ 85280. admin@acme.com (555) 555-1212. Excludes donors who donated after 9/8/08.
 - Bob Robertson (\$5,000.00):** Donation, 12/10/07, CC, CC, PS. Received: \$5,000.00.
 - Mr. Doyle Brunson (908364):** 157 Club Ave, Longworth, TX 79543. superystems@rbglobal.com (915) 543-1212.
 - Mr. Doyle Brunson (\$10,000.00):** Donation, 10/16/07, Building Fund, CC, AGL. Received: \$10,000.00.
 - Mr. Tyrone Carter (880188):** 4861 Sand Fl., Pompano Beach, FL 33060. freerady@steelers.com.

Email Launch Mail Merge Preview:

The preview shows an email body with a thank you message for donations received between December 2007 and August 2008. It includes a table with columns for Name, Address, and City/State/Zip. The email body text is as follows:

Thank you for your generous support between December 2007 and August 2008. You contributed a total of \$15,000.00 to our organization.

We truly appreciate your support in the past year and we hope that all of you will continue to support us in the future. We are looking for your support in the future to complete the rest of our campaign to complete the interior of the new building now under construction. We need to raise an additional \$150,000.00 to complete the interior of the new building now under construction. We need to raise an additional \$150,000.00 and hope that we can count on a contribution from TowerCare Technologies for \$5,000.00.

City/State/Zip: TowerCare Technologies, Pompano Beach, FL 33060

This figure shows a LYBUNT (Last Year But Unfortunately Not This Year) report. Launch mail merge from this report to reach out electronically (email) or by direct mail to these lapsed donors.

- Most profitable and least profitable appeals
 - Is your annual gala becoming more or less profitable over the years? What are you spending on overhead? What monies came from sponsorships?
- Monthly donations
 - How much did you take in this month? How much of that was from straight donations and how much was from pledges? How much of that income went into a particular fund?

- Large donors
 - Who are your largest supporters? Are you keeping in touch with them?

The screenshot shows a software interface for a Donor Detail Report. The window title is "Donor Detail Report" and it includes a search bar and various filter options. The main content area displays a list of donors with their contact information and a table of their donation history. The donors listed are Mr. and Mrs. Gerald Barry Cooper, Mrs. Jane Ann Davis, and Ms. Barbara Emerson. Each donor's record includes their name, address, phone number, and a table of donations with columns for date, amount, and type.

Donor	Date	Amount	Type	Event/Category
Mr. and Mrs. Gerald Barry Cooper (800022) 461 Spring Valley Road, West Mifflin, PA 15122 chefsio@starmail.net (412) 318-4621	1/8/09	\$1,000.00	Donation	CC CC PROP
			Largest	
	2/2/09	\$150.00	Donation	Golf Outing 2009 Events 2009 Golf 2009 Invite
Mrs. Lynn Olivia Cooper Last	2/4/09	\$100.00	Donation	Golf Outing 2009 Events 2009 Golf 2009 Invite
			Last	
Mrs. Jane Ann Davis (800151) 123 North High St, Morgantown, WV 26505 (304) 555-6785	1/8/09	\$250.00	Donation	Building Fund CC Appeal 1
	1/27/09	\$300.00	Donation	CC Campaign AGL 1
			Last	
Ms. Barbara Emerson (800007) 6480 Weathervane Circle, Apt 307, San Diego, CA 92121 babse@sd.net (760) 722-9555				

A simple Donor Detail report like the one shown in this figure allows you to accurately track the effectiveness of your donor cultivation process, your campaigns and your appeals so that you can repeat what works best for you.

Creating the appropriate reports is important and can be a challenge if you are not familiar with common query logic. Querying basically refers to questioning or inquiring about what is in your database. For example, you may query your database to find all of the people on your annual newsletter mailing list. In order to do that you will need to set up filters or criteria to narrow the amount of data that is reported back to you. You will filter for only those people that have some type of notation on their record that indicates they should get the annual newsletter.

Queries can range from very simple to extremely complex depending on what you want out of your database. Regardless of what database software you are using, it is a good idea to write down what you want before trying to create the query within the software. This can be a good outline for all of the filters you will need to set. For example you may write, "I want to see a list of donors who have given in the past year AND are Not deceased AND are in the Volunteer group OR the Staff group." There are several filters you will need to assign to your query in order to generate this report. In this instance you will want to set a date range filter on the donation received date to include all dates within the past year. You will filter on deceased date and use the operator "is blank" or its equivalent so that you will not have any deceased donors returned. You will set a filter to include constituents that are either volunteers or a staff

member. The words AND and OR are very different in regards to query logic and very important. If you want your results to match multiple filters or criteria then you will need to use AND, or your software's equivalent, in order to designate that your results need to equal more than one criteria. OR is used if you want results that only need to match one of the items or criteria listed. Again, regardless of the software you are using, the easiest way to plan a query is to write out what you want to include and exclude, and then use that as your guide during the setup process.

Your database software should allow you to query on all data (every field – even custom fields). Once you master queries, think of how easy it will be to create custom and ad hoc board reports – no matter what the board wants to see or how they want to see it.

Your database is only as good as the data that is entered. You have most likely heard the term, “garbage in, garbage out,” in reference to computer information. Well, you can have the cleanest data in the world, but if you cannot analyze it and get it out in a format that you can use to conduct your day to day business, then it is not of much value. Remember to evaluate your data on a regular basis in order to keep it clean and up to date. Also, make sure that you are able to retrieve the information you need from your database. Being able to do these few things will help you get closer to, and hopefully exceed, your fundraising goals.

We hope you found this information to be helpful and informative. Please look for the third article in our *Database Management for Nonprofits Series* which will be available for download at www.towercare.com in January 2010.



To check out DonorPro, a relational database with easy to use query tools and powerful reporting capabilities, arrange a free no obligation demo by calling toll free 866-935-8281 or visit our online DonorPro Product Tours at www.towercare.com/content/product-tours.