



Why You Need a Donor Management System

Advancement is all about the individual relationship. A donor management system helps you to build and manage that relationship:

- How is this person affiliated with my school?
- When did that affiliation begin?
- Are they affiliated with others with whom we have a relationship?
- How does this person prefer to be addressed?
- How does this person prefer that we contact him or her?
- What are the special things we want to remember about this person?
- To what groups does this person belong?
- For whom does this person work?

A donor management system helps you keep track of your communication with all constituents.

- How often have we been in touch with this constituent?
- When and how? For what purpose?
- How often has this constituent been in touch with us? When, how, for what purpose?
- Have we called, sent emails, written letters or had meetings with this constituent?
- To what end?
- Have we invited this constituent to events? Have they attended?

A donor management system is essential for tracking giving.

- Has this person given to my school?
- When? In response to what stimulus?
- To what fund do they give?
- How often do they give / have they given? Over how many years?
- What is the sum of the gifts they have given to my school?
- Do they have the capacity / affinity to give more?
- How have we thanked them?

A donor management system allows you to analyze your relationship with groups of constituents.

- How are members of different segments responding to your appeals?
- What percentage of different segments participate in your programs?
- What funds are the most attractive to different groups of constituents?
- What attracts engagement by some class years over others?

A donor management system gives you the data that is necessary for effective reporting, analysis and strategic planning.

- How does giving this year compare to last year?
- How many constituents are giving consistently year after year?
- How are we responding to that consistency?
- How many constituents made their first gift this year?
- How did we respond to that gift?
- Are you seeing a shift in gifts to one fund from another?
- How effective are your communication devices in soliciting gifts or engagement?
- Did you meet your budgeted goals for each solicitation?

A donor management system gives you data about events that help you assess their efficiency as fund raising programs and their long term viability.

- How many invitations did you send for the event?
- How many people attended your event?
- How many volunteer hours did it take to produce your event?
- What portions of the event raised the most money?
- Has this event grown over the years?
- How did you communicate with attendees? Did you have a system in place to simplify this process?

Finally, a donor management system helps you assess the effectiveness of your advancement program: are your efforts fruitful? Are you spending your resources in the most responsible way?

You need a donor management system because without one you do not have ready access to all of this information. Without one you cannot build a relationship that helps you move the donor from being a sometimes giver to someone who is committed to your mission. You cannot assess the advancement work that you are doing and without assessment your program will not advance.

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