Donor Database Task Review Checklist

Here are some tasks that should be completed on a regular basis to keep your donor database clean and healthy.

Daily:

* **Dashboard Review** - Every user should have a Dashboard custom to their role in organization and it should be reviewed daily.

* **Action To Do Review**: Each user should review the Actions in Raiser's Edge that are scheduled for them to be completed today.

* **Gift and Constituent Batch Review and Commit** - Review and commit gift and constituent batch's to ensure that data is being entered consistently with key fields such as Constituent Code, Address Fields, Campaign, Fund, Appeal, and Package populated correctly.

* **General Ledger Review and Posting** - At the end of every day, revenue transactions should be posted from donor database to General Ledger.

Weekly:

* **Actions Completed Review** - Every Monday morning a report that measures the number of touch points every Solicitor completed during the week before. The number for each Solicitor should be listed next to a weekly goal for each Solicitor and sent to all donor database users.

* **Data Entry Review** - Every Monday morning a report that measures the number of constituent records that were updated during the week before by each donor database user. The number of updates for each user should be listed next to the number of those constituents that are missing key data on their record. This reporting should be sent to all donor database users.

* **New Constituent Note and Constituent Attribute Review** - New Notes and Attributes that were added last week should be reviewed to make sure that data was added to the correct location.

* **Query Clean Up** - Old Queries that are no longer required should be deleted. System Queries should be reviewed and updated where needed.

* **Web and Email Integration** - Web and email integration with donor database processes should be reviewed and updated where needed.

* **One Hour Training** - One hour of weekly training should be scheduled over the long term for all users and the Action Review and Data Entry Review reporting should be used to help indicate what training should be focused on and who must attend.

Monthly:

* **Backup and Maintenance Check** - Whether hosted or not, these items should be verified as being completed once a month. If hosted locally, you need to schedule backups to run daily, maintenance items to run weekly, and backups to be tested monthly all using the Blackbaud Management Console. If hosted, you need to request a backup once a month from Blackbaud and download current version and patch for Raiser's Edge in order to have a test environment and access your data if you cannot access the data center.

* **Benchmarking Reporting and Review** - Key data health Queries should be run and numbers added to Benchmarking reporting in order to track changes on a month over month basis. With this you are benchmarking against yourself to see if things are improving or not over time. This document should be completed and sent to each donor database user at the end of every month to comment on and understand what data is available for them to work with.

* **Table and Attribute Review** - Review the list of all active table and attribute values in order to determine what values need to be made inactive or added.

* **Campaign, Fund, Appeal, and Package Review** - Review the list of all active Campaigns, Funds, Appeals, and Packages in order to determine what values need to be made inactive or added.

* **Letters and Receipt Review** - Review each active letter in the Letter section of Configuration and confirm which ones should be made inactive and what new ones should be added. Donor Acknowledgement and Receipt sections should also be reviewed and updated where needed.

* **Duplicate Review and Clean Up** - Duplicate reporting should review all possible duplicate constituent records with an indication of percentage level match. Duplicates should be cleaned up monthly.

* **Monthly Donor** - Review and update monthly payment information where needed.

* **Action Track Review** - Review current Action Tracks, their assignments, and stale Action Track assignments.

* **Relationship Review** - Review new relationships added to make sure they have their own constituent record, they have accurate Relationship and Reciprocal fields, Date From, and Contact Types.

* **Prospect Review** - Review active qualified prospects and their active Proposals to ensure entered properly and updated often.

* **Event Review** - Review current events to make sure that all key event data has been entered on the Event record.

* **Appeal Review** - Review current and active Appeals to make sure all key Appeal data has been entered and kept current on Appeal including Start Date, End Date, Inactive, Goal, Default Gift Amount, Benefits, Number Solicited, Solicitor, Campaigns, Funds, Packages, Actions, Attributes, and Expenses.

* **Assigned Appeal Response Review** - Review Assigned Appeal updates made during month and their responses recorded.

* **Pledge and Recurring Gift Review** - Review cash flow reporting on pledges and recurring gifts, past due reporting for each, and generate reminders.

* **Donor Status Review** - Run reporting to generate how donor status has changed over past month and update current status in Membership or Constituent Attribute.

* **Primary and Target Constituent Code Review** - Review summary Primary and Target Constituent Codes to understand overall current relationship focus and current relationship target.

* **Security Review** - Review security groups and user assignments in your donor database and make adjustments where needed.

* **Goal Review** - Review all organization goals and make sure they are recorded in donor database and current.

<u>**Quarterly:**</u>

* **National Change of Address** - All constituents in your donor database should be run through the National Change of Address data append. Results should be reviewed and you should confirm how you are going to use and update any new addressed received plus those constituents that have moved but not shared new address.

* **Reporting Review** - Review all currently used reporting for changes needed, errors in reporting, and new reporting needs.

* **Constituent Cross Reference** - Identify other databases within your organization where key constituencies are shared and every quarter make sure that data is in synch between the other database and your donor database.

* **User Manual Review** - Review and make sure all user manuals are up to date and available to all donor database users. Review processes with outside vendors to see what areas can be improved upon.

<u>**Semi-Annually:**</u>

* **Database Audit** - Go through and update numbers and comments on the 100 point check for the Donor Database Audit. Survey all donor database users on key areas of use and have them comment on what is working well and what is not for each area. A new document should be created with each run and reviewed with key users of donor database. Once review is complete, 10 priority clean-up areas should be identified and focused on for the next 6 months.

Annually:

* **Phone and Email Appends** - Identify constituents that you need more contact information for and run through phone and email append services. REMEMBER THAT THE DATA RETURNED SHOULD BE TREATED DIFFERENTLY FROM DATA YOU RECEIVE DIRECTLY FROM CONSTITUENT.

* **Vendor Review** - A review with technology vendors is needed to review costs and needs over the coming year. Always ask what more can be done and where you can save money.