Best Practices: First of the Year Setup

It's a New Year! Here are some *Best Practices* for updating your DonorSnap database to get your new year off to a great start.

New Year Checklist

1. Update your System Year (Maintenance > Site Setup > Additional Site Options)

    a. DonorSnap has system fields for **DonationAmountPriorYear** and **DonationAmountYTD**. These fields are calculated by your system year.

    b. Dashboard Apps and Reports still use Any Year you want to include, so if you run a fiscal year for membership, but calendar year for overall financial, that's not a problem. The System Year only correlates to those two fields, which you will only see under Community > Contacts and if you specifically use them in DataMinerPlatinum reports.

2. Request an NCOA cleaning of your addresses, if you have not performed this recently

    a. Email support@donorsnap.com and simply request that they send your database through an NCOA cleaning. They will send you follow-up materials on what to do, once it is completed.

3. Clean Up your Dropdowns (Maintenance > Site Setup > Field & Screen Customization)

    a. If you track yearly Appeals and Campaigns, inactivate those outdated options.

    b. Note: once an option is inactivated, it will not appear in the canned reports.

4. Other items to clean up:

    a. Update your Thank you letters

    b. Confirmation Emails for Online Donation forms

    c. Inactivate outdated Email PDF acknowledgements (save the ones you use as templates, hide the rest)

    d. Delete old DMP reports you no longer need

5. Inactivate contacts that have not donated in (how many) years. Establish a management plan for the contacts in your system. Do you inactivate donors when they have not donated for 3-5-7 years ?

Dashboard Apps

1. Donor Retention Rate

   a. Create a new Donor Retention app on your Dashboard for this year (or create two… one to show last year's rate as a goal to hit – or surpass – for this year)

2. Pledge Report on Campaign and/or Appeal for this upcoming year

   a. Create a Pledge Report app on your Dashboard for at-a-glance totals of your projects and fundraising efforts

3. New Donor Goal

   a. Create a Goal for New Donors (or new Contacts, or new Volunteers) this year

   b. Note: Run **Reports > Fund Development > New Donors** report on the previous years to see how many new donors you get each year, to have a realistic goal for this year

Reports

1. NOT- Giving (Reports > Donation Activity > Non Giving) who did Not give to the Capital Campaign last year

2. DataMinerPlatinum – run a lapsed, but returned, report

   a. Query: DonationAmountYTD >= 0
   AND   DonationAmountPrior = 0
   AND   DonationAmount2YearsAgo >= 0

   b. Update your Donor lists (Current Members, Board, Volunteers, Sponsors)

3. Reports > Fund Development

   a. Fundraising by Campaign & Appeal

   b. Periodic Comparison – huge data dump out to Excel of previous giving

   c. LYBUNT (Lapsed Donors, who gave Last Year but unfortunately not This Year)

   d. New Donors

www.DonorSnap.com
Message Center: 262-696-9158
feedback@donorsnap.com

Best Practices: First Quarter Setup

Webinars:

AI Reports (DonorSnap Analytics) for Strategic Planning This webinar from our Marketing department covers first of the year reporting and dashboard widgets using DonorSnap's AI tool, DonorSnap Analytics.

Moves Management 101 & 201 These webinars will cover how to establish a moves management plan in your database, and then how to report on and communicate with the results of those moves.

Automated Task Manager overview video or this 30 Minute Webinar

Dashboard Apps & Goals overview video

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