




Welcome to Bloomerang Academy

Thank you for joining us!

Please tell us where you are joining us from and what the weather is like where you are....drop it in the CHAT!



Housekeeping

Live Transcript

We all know what we want to do is spend
administration and more time Doing the w

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Chat



Raise Hand



Q&A



Live Transcript

Share ideas

Ask questions

Housekeeping

Dial in number: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to support@bloomerang.com. Our support team is amazing!

Poll



Diana Otero

Sr. Product Marketing Manager

Diana Otero is a Product Marketing Manager at Bloomerang. She served on the board of the Nantahala Hiking Club, one of the 31 trail maintaining clubs of the Appalachian Trail Conservancy, a nonprofit driven and powered by volunteers. She is currently an active volunteer and auxiliary member of VFW Post 7119 in Indianapolis, IN.



Database Management



Agenda

1. Database Management
2. Establishing Data Policies and Procedures
3. Recurring Database Management
4. Recurring Reports
5. Q&A



What is database management?

Database management is the process of gathering, cleansing, enhancing, and using data **to help serve your nonprofit's mission and goals.**

Why does data management matter?

- Effectively and efficiently segment and target constituents
- Ensure you have a single constituent view
- Avoid compliance issues
- Increase your overall ROI
- Reduce wasted budget spending

Data Policies & Procedures

- Data is complete and accurate
- Data is entered consistently
- Avoid duplicates
- Acknowledgements and communications
- Reporting

Establishing Data Policies & Procedures

- Who is a part of the discussion?
- Who has access to your database?
- What training is required for different levels of access?
- Are there codes or attributes that are way more expansive than they need to be?
- Are fields not required that should be? Are fields required that shouldn't be? Are people plugging junk into those fields as a result of having to put something there?
- Does your campaign, fund, and appeal structure work for your organization?

Data Policies & Procedures

Purpose of the Data Policies

Profile Management

- a. Entering a new profile
- b. Database consistency standards
- c. Managing constituent names and salutations
- d. Managing constituent contact preferences

Transaction Management

- a. Entering in a new transaction
- b. Funds, campaigns and approaches
- c. Documenting in-kind gifts
- d. Examples of other transaction documentation
- e. Anonymous transaction coding
- f. What is a "Soft Credit?"
- g. Adding a Soft Credit
- h. Entering in a "Tribute Gift"
- i. Entering tribute information for a transaction
- j. Send tribute notifications

Interaction Management

- a. Sending out acknowledgement letters
- b. Adding a letter template
- c. Acknowledging Online Gifts

Report Management

- a. Query vs. report in Bloomerang
- b. Managing reports

Bloomerang Management

- a. Bloomerang forms and PCI
- b. Bloomerang back up and security

Data Quality and Maintenance Reports

Development Transaction Processing Procedure

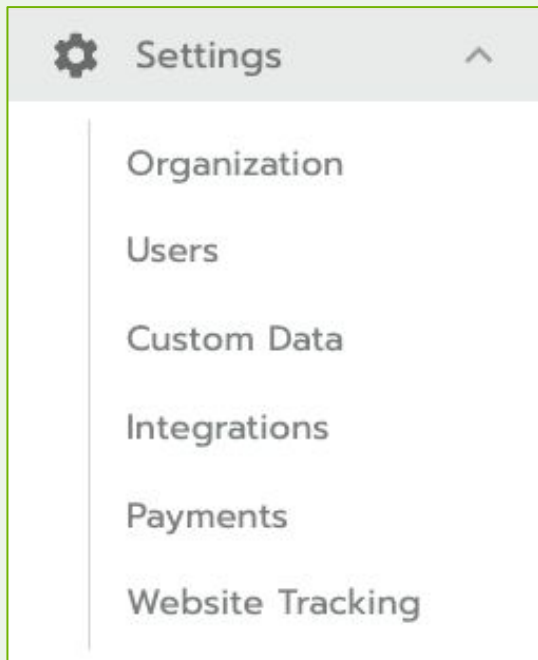
Transaction Reconciliation Processing

Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left and bottom-left corners of the slide.

Database management is the process of **gathering**, cleansing, **enhancing**, and using data to help serve your nonprofit's mission and goals.

A portion of a large, vibrant green Monstera leaf with characteristic holes, positioned in the bottom-right corner of the slide.

Settings



Update your organization information

- Set your Fiscal Year Start Date
- Set your [NTEE Code](#)
- Set two-factor authentication for logins

Create users

- You can have as many as you need!
- Every user should have their own login ID/Password
- Decide what permissions users need

Set up custom data

- Create your Funds, Campaigns, Appeals
- Capture custom information that's important to your nonprofit

Turn On NCOA (free!)

Link your accounting software (if applicable)

Enable automatic receipting

Campaigns

Campaigns are
specific,
overarching
fundraising efforts

Financial Goal

Date Range

Examples:

Annual Campaign

Capital Campaign

LARGE Events

Funds

Funds are buckets
of money

*Funds are the only
required gift field of the
three in Bloomerang.

Money is going to that specific
bucket

Examples:

Unrestricted
Program
Scholarships

Appeals

Appeals are a specific request for funds

*An appeal by any other name is still an appeal:
Motivation, Effort,
Solicitation, etc.

Examples:

Spring Appeal


Major Gift Ask

Personal Solicitation

Event Sponsorships

Funds, Campaigns, and Appeals are not mutually exclusive!

Typically, transactions only have one Fund, Campaign, or Appeal associated with them.

Date	<input type="text" value="2/10/2023"/>	
Amount	<input type="text" value="\$1,000.00"/>	
Non-Deductible	<input type="text" value="\$0.00"/>	
Fund	<input type="text" value="Unrestricted"/>	
Campaign	<input type="text" value="2023 Capital Campaign"/>	
Appeal	<input type="text" value="Personal Solicitation"/>	

If a donation goes toward different Funds, e.g. \$500 to Unrestricted and \$500 to Programs, use **Split Payments**.

Custom Fields

Customize your database to capture what is most important to your organization.

Select from five data types:

Text

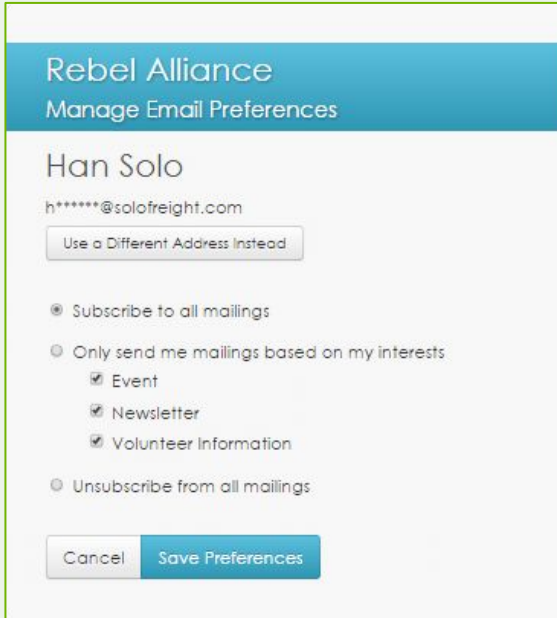
Date mm/dd/yyyy

Date (Year Only)

Number

Currency

Email Interests



Rebel Alliance
Manage Email Preferences

Han Solo
h*****@solofreight.com

[Use a Different Address Instead](#)

- Subscribe to all mailings
- Only send me mailings based on my interests
 - Event
 - Newsletter
 - Volunteer Information
- Unsubscribe from all mailings


[Cancel](#) [Save Preferences](#)

Email interests are categories of emails that your constituents are interested in receiving. Constituents can choose to receive all your mass emails, receive only emails marked with certain interests, or opt out of all mass emails.


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**Let's get into
Bloomerang!**

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Groups

Groups are subsets of constituents who share a common trait.

To strengthen donor relationships, communicate with groups in ways that feel personal and relevant to group members.

Examples:

- Call new donors and send a welcome kit.
- Invite prospective donors to free events.
- Encourage volunteers to volunteer again and to become donors.
- Invite supporters who live in your area to an in-person event; invite others to watch the live stream.

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Cleansing your data

Identify and Reduce Bad Data

- Duplicate Constituents
- National Change of Address (NCOA) Processing
- Deceased Suppression
- Bad Emails
- Card Updater

Declutter Your CRM

- Bulk Update
- Bulk Delete

Regular Maintenance

Your Data Management Checklist

Because organizations evolve as they grow, it's important to re-examine your processes every once in a while (at least annually). You may have an obsolete procedure, or find that there's a slightly better way to do something. Don't be afraid to change if it increases your productivity!

Daily/weekly

- Enter new data (as needed).
- Update existing data (as needed): Don't wait to update data if you get a change of address, name, marital status, employer, etc.
- Back up your data: Some database programs do this automatically, some do not.

Every month

- Identify and merge any duplicate records.
- Run reports to keep team members updated.
- Review fund/campaign activity.
- Review rolling LYBUNT / SYBUNT.
- Review overdue pledges.
- Review your data against your goals.

Every 3 to 6 months

- Invest in advanced data services, if necessary:
Consider phone append (reverse), email append (reverse), birth date append, name append and deceased suppression processing.

- Revisit your strategic plan. Don't wait until the end of the year to determine if you're hitting your goals. If it's not performing to your expectations, you can make tweaks or changes to ensure that your campaign is a success by year's end.

Every 12 months

- Run an NCOA. A whopping 17% of Americans move each year — don't miss out!
- Purge your donor list. If you're like the average nonprofit organization, around 88 percent of your donations are generated by about 12 percent of those on your donor list. Don't waste efforts on those who are not engaged. Remove the names of people who have not donated to your cause in two to three years, except former volunteers and board members.
- Develop an in-depth report for your donors to show them how their donations are making an impact.
- Check businesses on your donor list to see if contact information needs to be updated.
- Review and update the organization's data management policy. If you don't have one, develop guidelines to ensure that the data gathering, entry and maintenance process is consistent no matter who is handling the task.
- Train your staff on any updates with your donor management software to ensure that it's being used effectively.

Recurring Reports

Weekly

- First Time Donor List
- Unacknowledged Gifts from Last Week
- Weekly Financials

Monthly

- Monthly Financials
- Campaigns Progress Report
- Funds Progress Report
- Appeals Progress Report
- Tasks

Recurring Reports

Semi-Annually or Semi-Fiscal Year

- Financial Reports
- LYBUNT Report
- SYBUNT Report
- Custom Field Reports

Annually

- Annually - A full database audit!
 - Annual Financials
 - Annual Campaigns, Funds, and Appeals Reports; update plan
 - Total Constituents Report
 - No Activity Report
 - Audit Meeting & Report

**Let's go into
Bloomerang!**



A conceptual image showing two hands of different skin tones holding a wooden staff. The background is a clear blue sky with a bright sun in the upper right, creating a lens flare effect. The text 'Succession Planning' is centered in the image.

Succession Planning

What if you win the lottery?

What happens if there is a reason you need to take FMLA/an extended leave?
What happens if your living knowledge retires or you hit a period of high turnover?

Add institutional knowledge to your database

Create database policies and procedures

Each role should have a day-to-day How-To guide for their job

Know who your backup is, and shadow!

Beware of Data Hoarding

Don't be afraid to remove custom fields and data from your database.

Does this help you fundraise?

Is this relevant to your

organization and your mission?

You can always export the data first as a backup.

Prepare your database for year-end Fundraising and beyond!

Don't let inconsistent or unreliable data stop your nonprofit from reaching your donors.

[Click here to learn more](#)



Poll





Resources

[Data Policies and Procedures](#) (Free Template)

Knowledgebase

[Fund, Campaign, & Appeal Basics](#)

[Custom Field Basics](#)

[Groups](#)

Free Articles, eBooks, Templates

[Data Policies and Procedures Template](#)

[Data That Changes the World](#)

[Is It Okay to Delete Inactive Donors From Your Database to Keep Costs Down?](#)

[4 Tips: When to Remove a Lapsed Donor from Your Database](#)

Bloomerang Academy

[Database Setup Basics](#)

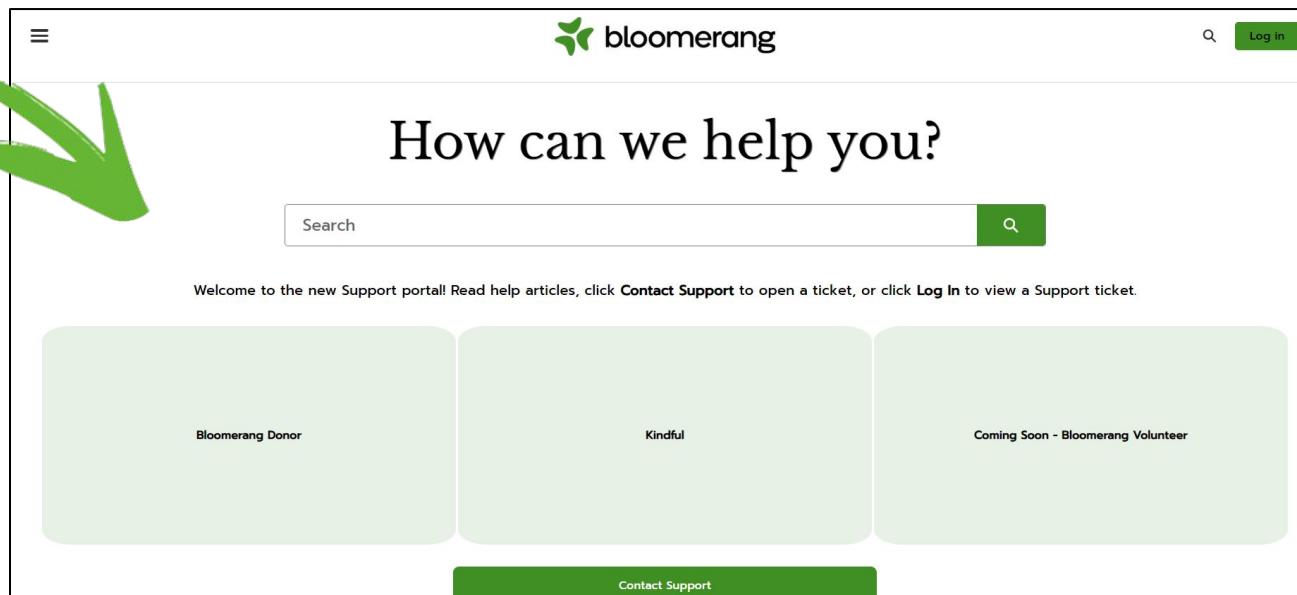
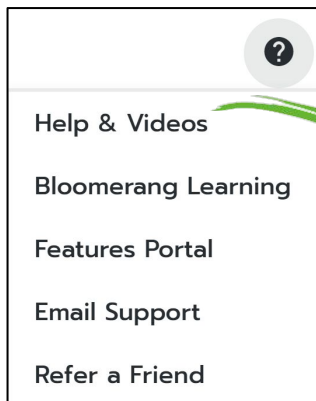
[Clean Up Your Data to Improve Your Fundraising](#)

[Bloomerang Coaching Services](#)

[Bloomerang Consulting Services](#)


Resources

Bloomerang Knowledgebase and Support Portal






Resources

Bloomerang Learning – our new on-demand learning platform




- Help & Videos
- Bloomerang Learning**
- Features Portal
- Email Support
- Refer a Friend

 Contact Support Upgrade My Account Visit our website  


Welcome to Bloomerang Learning

[Home](#) [Dashboard](#) [Learning Paths](#) [Catalog](#) [Events](#)


Content by Product



Donor Database
Access learning for your Bloomerang Donor Management System



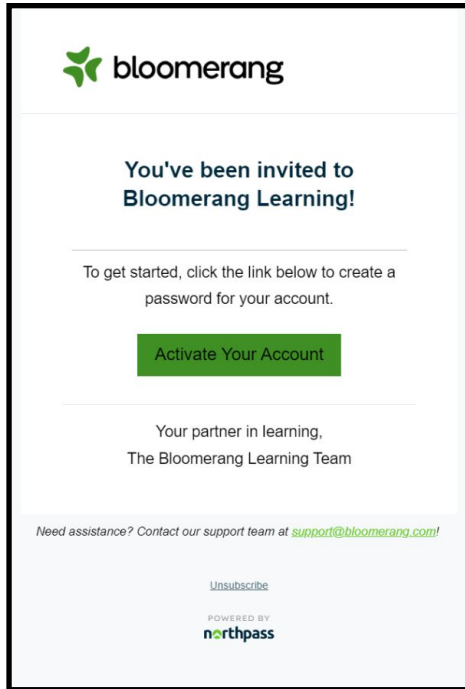
Fundraising
Access learning for your fundraising tools within Bloomerang Donor



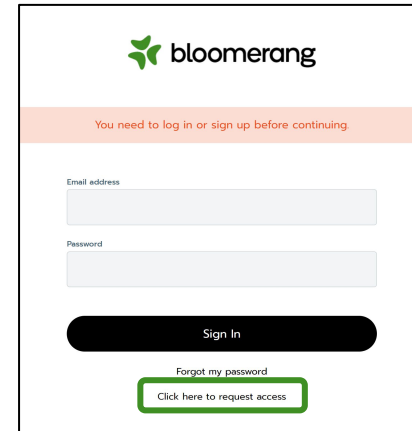
Volunteer Management
Access learning for your Bloomerang Volunteer System

Resources

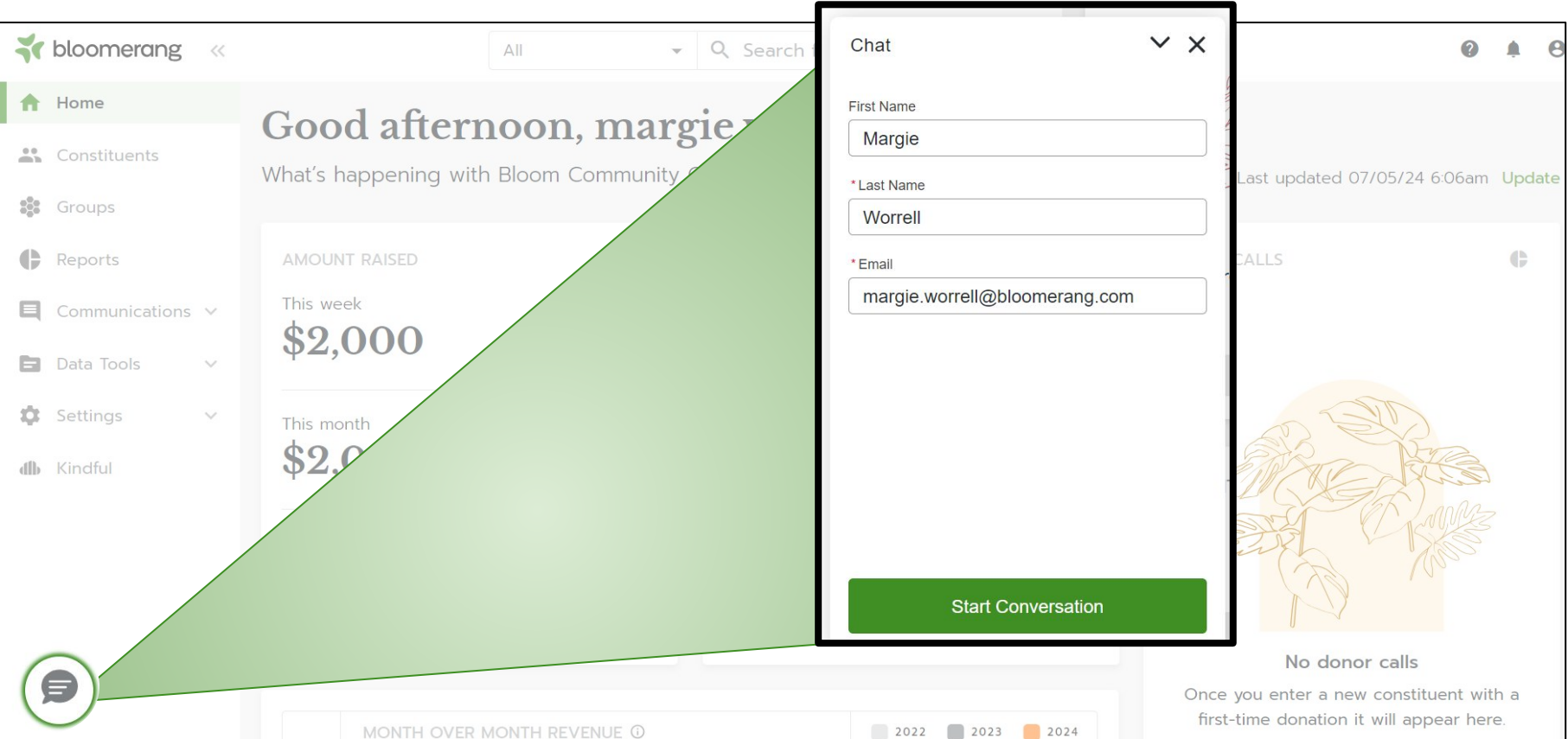
Bloomerang Learning – our new on-demand learning platform



If you did not receive this email to activate your Bloomerang Learning account, click on Bloomerang Learning to request access or reach out to support!



Live Chat to get online assistance immediately



The image shows a screenshot of the Bloomerang dashboard with a chat window overlay. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area displays a greeting "Good afternoon, margie" and a summary of "AMOUNT RAISED" for "This week" at "\$2,000" and "This month" at "\$2,000". A search bar and a dropdown menu are visible at the top. The chat window, titled "Chat", is open and contains a form with the following fields: "First Name" (filled with "Margie"), "*Last Name" (filled with "Worrell"), and "*Email" (filled with "margie.worrell@bloomerang.com"). A green "Start Conversation" button is at the bottom of the chat window. Below the chat window, there is a section titled "No donor calls" with a note: "Once you enter a new constituent with a first-time donation it will appear here." A decorative illustration of a plant is also present in this section.

Home

Constituents

Groups

Reports

Communications

Data Tools

Settings

Kindful

Good afternoon, margie

What's happening with Bloom Community

AMOUNT RAISED

This week
\$2,000

This month
\$2,000

Search

All

Chat

First Name
Margie

*Last Name
Worrell

*Email
margie.worrell@bloomerang.com

Start Conversation

CALLS


No donor calls

Once you enter a new constituent with a first-time donation it will appear here.

A large, vibrant green Monstera leaf with characteristic holes, positioned in the top-left corner of the slide.

Thank you for attending!

Visit our website to see more upcoming
Bloomerang Academy webinars!

A smaller Monstera leaf, similar to the one in the top-left, positioned in the bottom-right corner of the slide.