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Bloomerang & Capital Campaign Pro

Multi-Chapter Webinar
May 29, 2024

Steven Shattuck
James Goalder

Your Panelists

James Goalder (@Goaldeje)

Partnerships Manager, Bloomerang

Fun facts:

- 1st job: McDonald's Drive-Thru
- **LOVES** to travel
- 4 kids, 4 cats, 1 dog
- Degrees in English and Art History from James Madison U
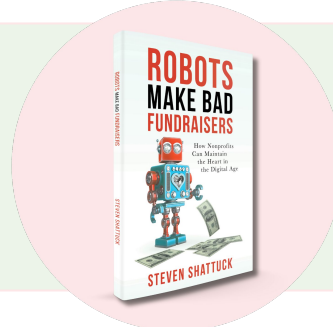- Married 27 years this May

Your Panelists

Steven Shattuck (@StevenShattuck)

Director of Engagement, Capital Campaign Pro

Fun facts:

- Enjoys cycling
- Wrote Robots Make Bad Fundraisers
- Teaches chess at his kid's school
- Received the David Letterman Scholarship
- Lives in Indianapolis with his wife, son, and daughter

Takeaways

1. What are Database Standard Operating Procedures and why are they important for Capital Campaigns?

2. How important is clean data and how do we get it clean?

3. What is wealth screening and is it worth the investment?

4. Why is everyone obsessed with segmentation?

5. Wrap Up

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Database Standard Operating Procedures

SOP Best Practices

- Instruct staff on documenting interactions and changes.

- Set guidelines for consistent text formatting.

- Document new or updated contact details immediately.

- Schedule biannual NCOA & deceased suppression checks.

- Standardize new employee training.

- Document donor relationships for cultivation strategies.

Just getting started?

Check out Bloomerang's Donor Management Software Data Policies and Procedures Template

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Clean Data

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Clean-up Tips

- ❏ Perform NCOA checks to update contacts.
- ❏ Run deceased suppression
- ❏ Append phone numbers and email addresses.
- ❏ Add missing birthdays and anniversaries.
- ❏ Merge duplicate records.

Wealth Screening

Why Run a Wealth Batch Screen?

What the data says:

The number of donors making $1000+ gifts **went up 77.6%** in the 3 months after a batch screen!

GIFT RANGE CHART SAMPLE
$2,500,000 WORKING GOAL

NUMBER OF GIFTS	$ AMOUNT OF EACH GIFT	$ amount from level	cumulative amount	% of total	Prospect multiplier	Prospects needed
1	$500,000	$500,000	$500,000	20%	X2	2
2	250,000	500,000	1,000,000	40%	X2	4
4	100,000	400,000	1,400,000	56%	X3	12
8	50,000	400,000	1,800,000	72%	X3	24
10	25,000	250,000	2,050,000	82%	X3	30
15	10,000	150,000	2,200,000	88%	X3	45
20	5,000	100,000	2,300,000	92%	X3	60
30	2,500	75,000	2,375,000	95%	X4	120
many	<2,500	125,000	2.500,000	100%	many	many

Capital Campaign Pro

Segmentation

Wrap Up

Contact Us

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