DonorPerfect/Annual Fund Committee

The formation of a DonorPerfect/Annual Fund Committee consisting of volunteers from the Advisory Board, future Alumni Association and the School Development Committee would be a working group in charge of maintaining the DonorPerfect Database and setting an overall communication plan and schedule for the coming school year. Volunteers would maintain the database by reviewing alumni data for accuracy and adding new alumni contacts. Development of an annual communication plan would include creating an annual calendar for mailing solicitations, annual newsletter and determining a yearly theme/message for the school fundraising objectives. The committee would also implement donor acknowledgement letters and set up the process.

The overall goal would be to develop a unified annual giving plan on behalf of all school related volunteer committees prior to the start of each school year. With increased volunteer resources and added training this could significantly increase annual giving, donor retention and alumni connections. Members of the committee could have one or more roles depending on their level of expertise including data entry, running reports and drafting communication. The committee would work in conjunction with the Pastor and Business Manager for approval of the objectives.

Volunteer Roles:

1. **General Data Entry:**
   - Enter donor and gift information into the database on a regular basis from emailed donation images sent from business office
   - The business office could set up a general "SBSDevelopment@stbl.org account that could be accessed by any data entry users. A folder in the email account could be created once the donation has been entered into DP and the email could be moved to a "Completed Entries" folder. All users would know the donation has been recorded if moved into the completed folder
   - Users would be assigned a web based user login and a nondisclosure agreement to be signed per the Archdiocese recommendation
   - Set up an ongoing process to receive information from the rectory on a regular basis for information on deceased parishioners or those who have moved to check if they are in DP and records need to be updated.

   - **Database Maintenance/Reports:**
   - System fixes: Work with Donor Perfect to have the maiden name field put back in the system based on the initial conversion issues with the original hard drive database (Spreadsheet from initial conversion can be provided by Kara Albanese/Kim Detweiler)
   - Run reports as requested: duplicate names/addresses, top donors, alumni class lists upon request, etc (Brian Andruszko has done this for top donors)

- Batch entry of data into system from spreadsheets (e.g. add alumni mailing addresses from reunions (Denise McDonald's spreadsheet from All Class Reunion can be provided by Kara Albanese), "Join Our Mailing List" (can be provided by Kara Albanese), parishioner contact lists from the rectory could be added in the future (can be provided by Bob Helmig/Helen Krauss), all families or graduates from school directory could be entered each year (can be provided by Maureen Booth from Option C) TBD if we want to enter parishioners and school families each year due to database fees based on the amount of donor records. We needed to limit costs at the time of conversion, but this should be revisited)
- Enter template letters/email communications into DP provided by the committee such as thank you with donor specific field codes (Christine Lancianese was part of DP training on this, but it has not been implemented for a mailing yet)

Alumni Assistance:
- Identify trusted alumni who are willing to help research and add alumni records into DP (Brian Andruszko is working on forming an Alumni Association with class ambassadors for different grades)
- Review donor records and update current address, status, deceased, duplicate address, etc as the alumni volunteers review donor records and make changes (Kara Albanese can provide duplicate address spreadsheets sent from Allegra printing/Don Maron after the last Annual fund mailing for volunteers to review)
- The original Access database had many incomplete records listing only the alumni name/grad year. These records were removed during the DP conversion to lower the monthly fees. These "empty records" can be reviewed by alumni to fill in the gaps where possible and entered into DP (spreadsheet can be provided by Kara Albanese or Kim Detweiler)

General Comments:

- Leadership of the group TBD (who would be the liaison with the pastor/business office?) Could the group run as a subcommittee under the Advisory Board with specific jobs/roles assigned which would be aligned with Marie Keith's recommendation of hands-on Advisory Board involvement. We currently do not have enough resources or willing volunteers to develop an effective working group of current school parent volunteers. There are currently 2 school parents with limited familiarity of the database (Kim Detweiler and Christine Lancianese)
- Review the overall donation entry process to streamline it: In the long run if the rectory were to use DP to record parishioner donations/record the donation could be entered directly from incoming mail
- The overall communication schedule for the annual campaign/solicitations should be developed in conjunction with the parish/business office so as not to coincide

with other fundraising initiatives or major communications, particularly paper mailing.
- ○ Assess pricing for monthly DP Helpline available for all users. We did not include helpline at the time of conversion due to additional cost