



• WEBINAR

Managing Large Fundraising Teams – Our Best Advice

Hosted by:
Andy Schroeder
& Nic Prenger

 July 23
1:00 pm CT

1



2



Fundraising Consulting
Annual Appeal Management
Raiser's Edge Database Administration
Fundraising Automation

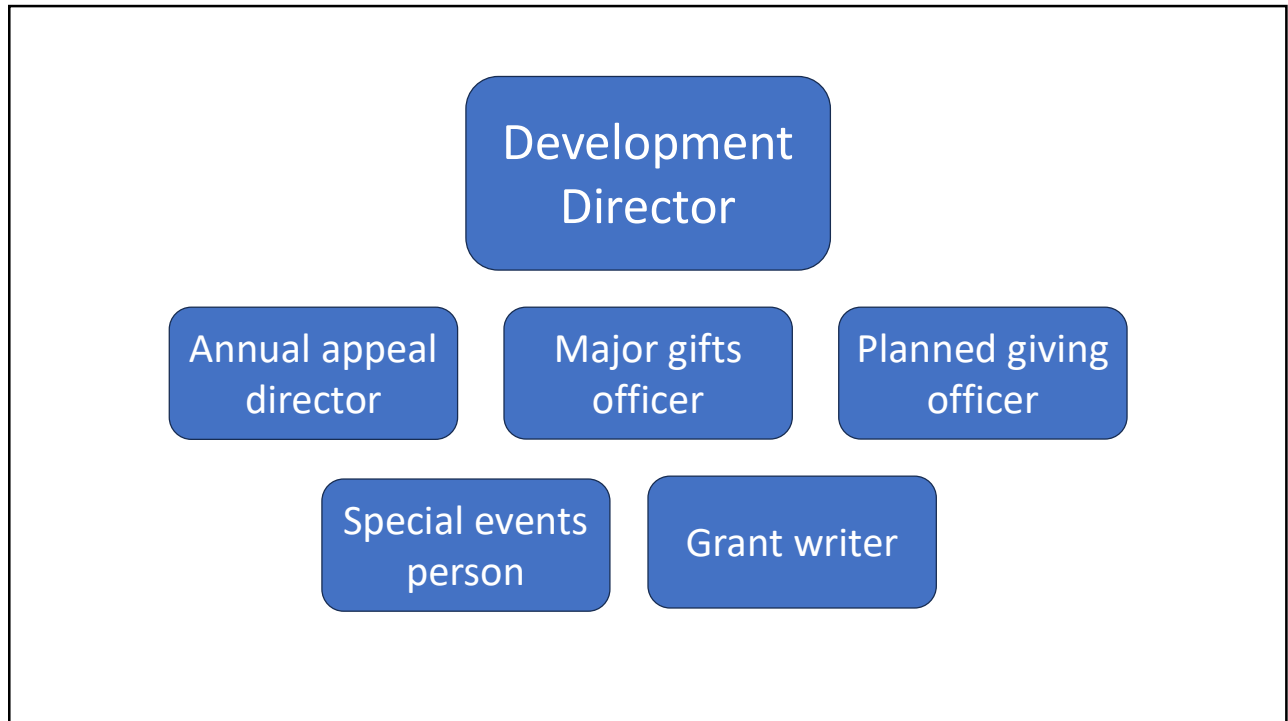


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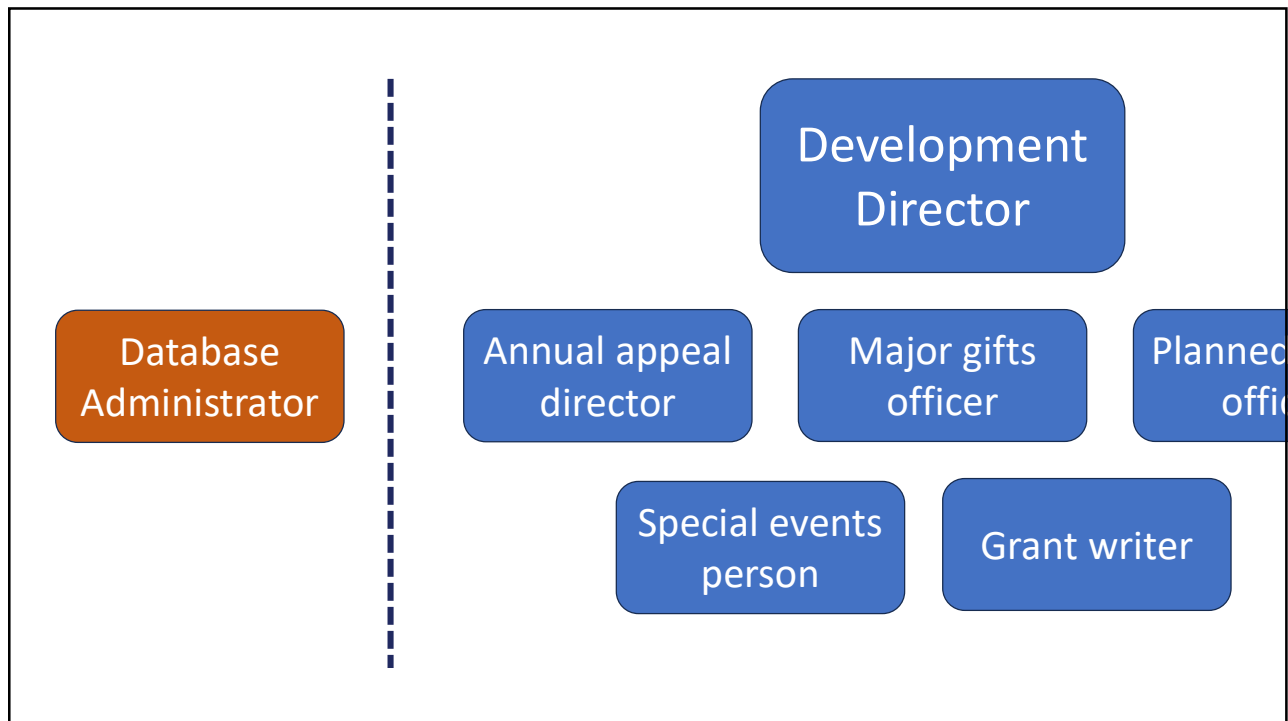
The modern development office



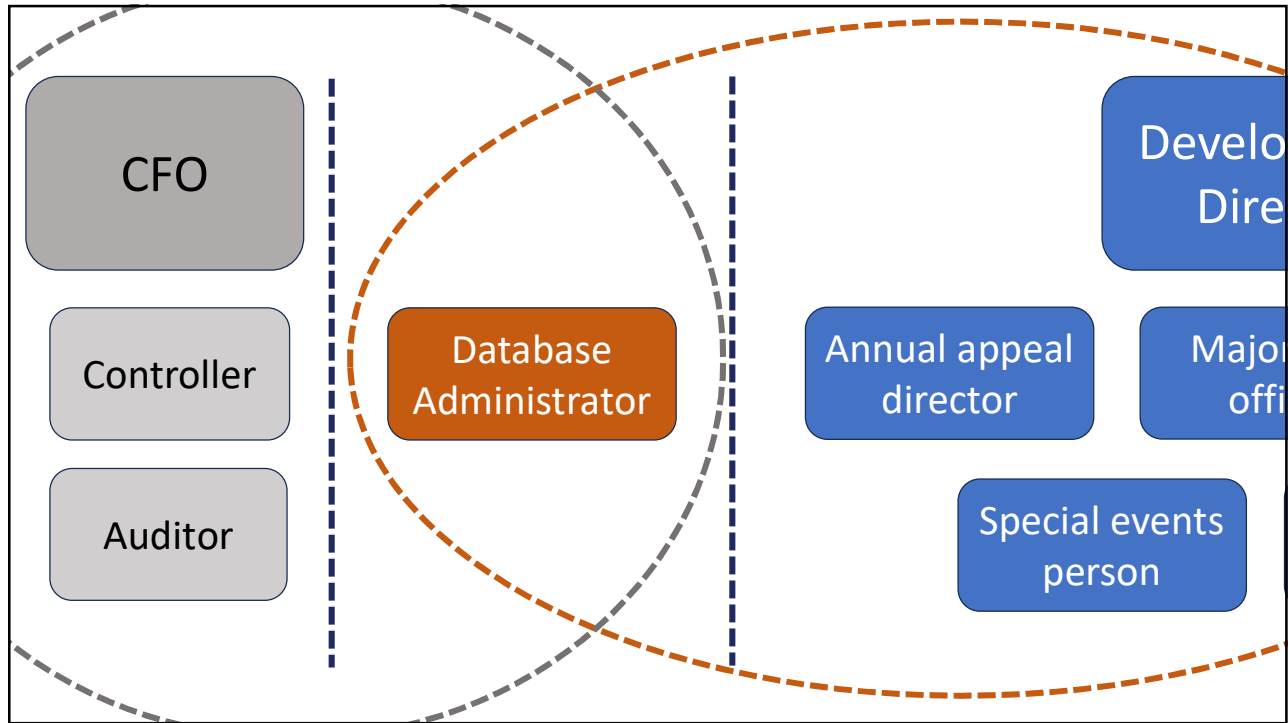
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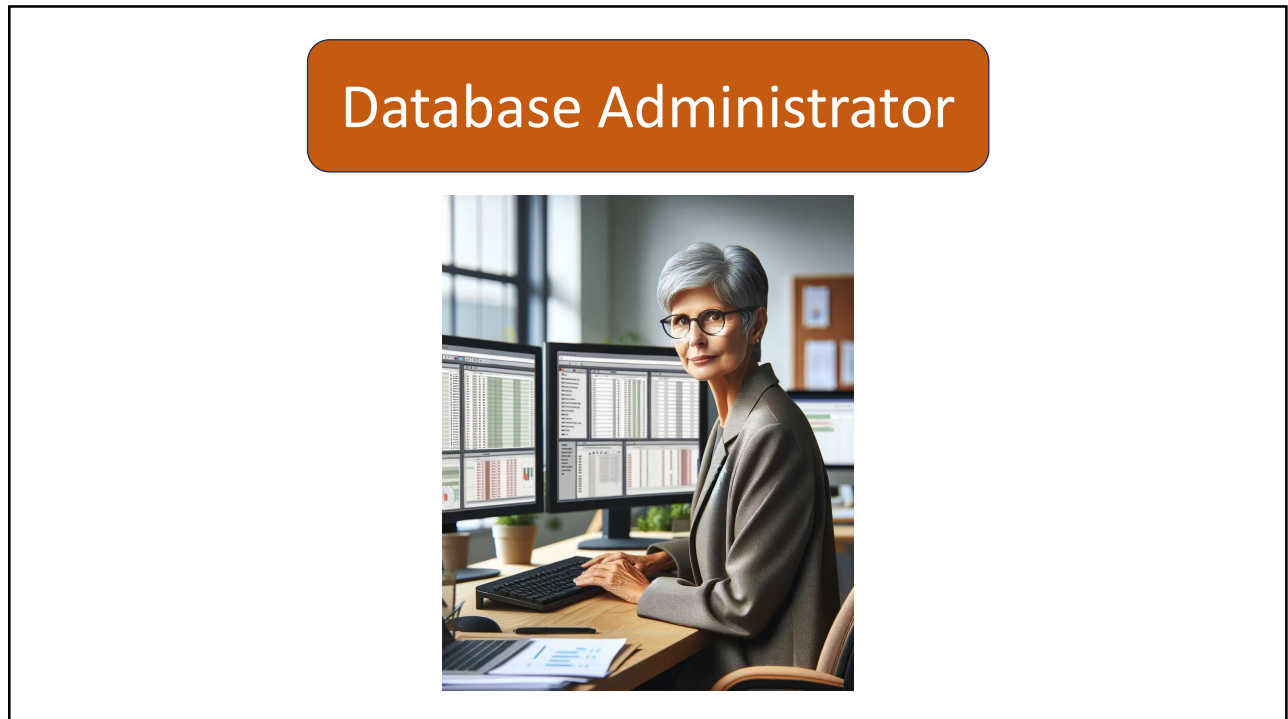
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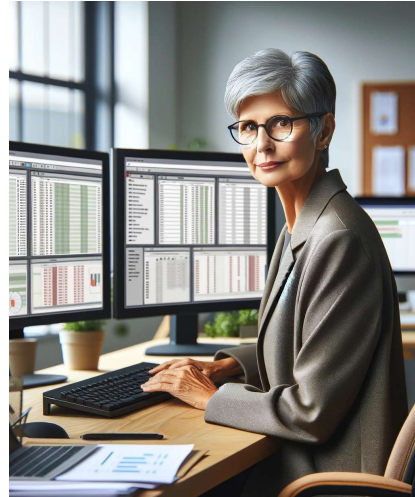
8

Database Administrator

More finance than fundraising

Cares about process and procedure

Source of institutional knowledge



9

Database Administrator

Annual appeal director

Development Director

Major gifts officer

Planned office

Special events person

Grant writer

10

Major gifts officer

More people-driven
than data driven

Doesn't care about
process or procedure

Relatively high
turnover

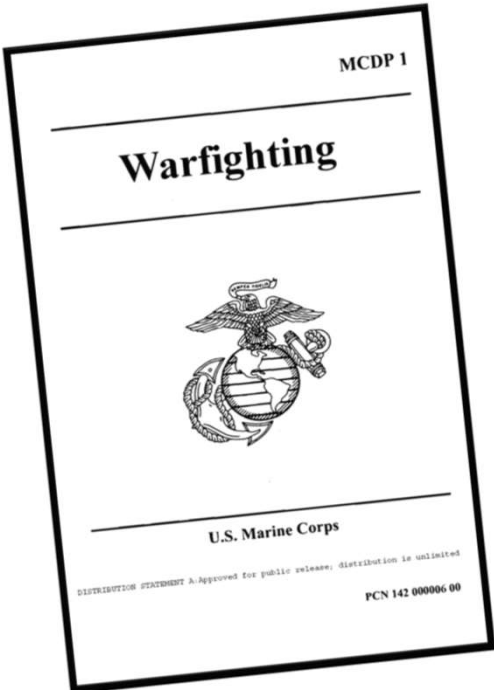


11

Friction

PSG

12

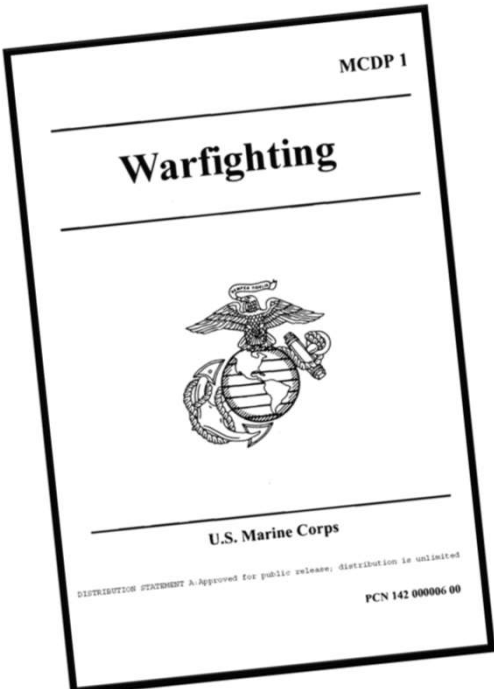


The image shows the cover of the MCDP 1 'Warfighting' manual. The cover is white with black text and a central emblem. At the top right, it says 'MCDP 1'. Below that, the title 'Warfighting' is written in a large, bold, serif font. In the center is the U.S. Marine Corps emblem, which features an eagle with wings spread, perched on a globe, with a anchor behind it. Below the emblem, it says 'U.S. Marine Corps'. At the bottom, there is a small line of text: 'DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited' and 'PCN 142 000006 00'.

Friction is the force that resists all action and saps energy.

It makes the simple difficult and the difficult seemingly impossible.

13



The image shows the cover of the MCDP 1 'Warfighting' manual, identical to the one in slide 13. It features the title 'Warfighting', the U.S. Marine Corps emblem, and the text 'U.S. Marine Corps' and 'DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited' and 'PCN 142 000006 00'.

Friction may be self-induced, caused by a lack of a clearly defined goals, **lack of coordination**, unclear or complicated plans or **complex command relationships**.

14

How friction shows up in development offices



15

1. The Magic Question Requirement



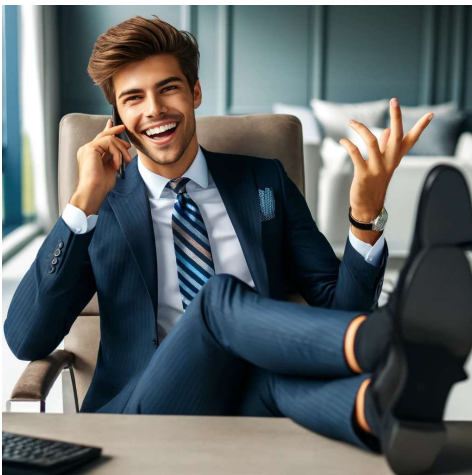
16

What's the problem? I gave you precisely the data that you requested, exactly as you requested it



17

2. The last-minute data request



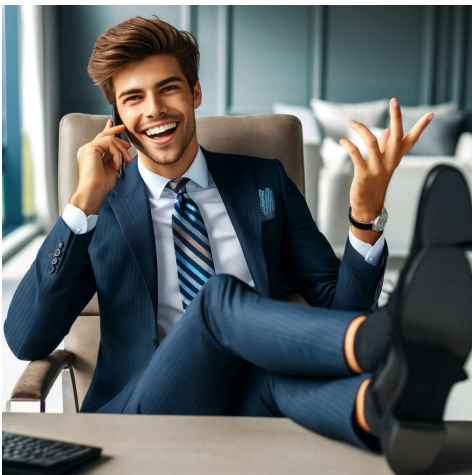
18

Hey, can you get me a report for meeting I have in 20 minutes?



19

3. Reluctance to change / Rigidity



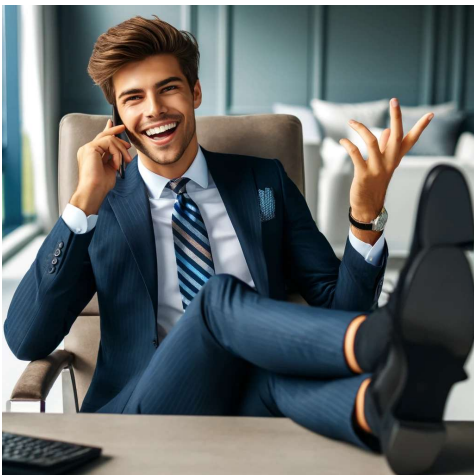
20

“I’m sorry, the system doesn’t let me do what you’re asking.”



21

4. Not respecting the data



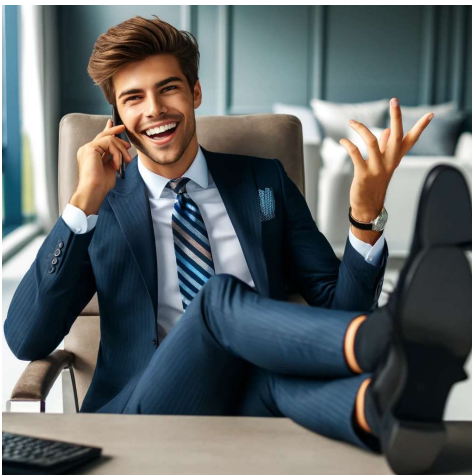
22

Sorry, I haven't updated my donor notes yet



23

5. Designing processes around the *data*, not the *donor*



24

“The donation form should require donors to enter their constituent ID number before they can make a gift.”



Tips to get your team
rowing in the same direction

Breakdown the silos

Communicate how each task/role
contributes to the whole

Everyone gets a hand in setting
the project timelines

Get finance involved in the
process

27

Post-mortem meeting

After each major event, mailing or
project

Discuss what worked, what didn't

Document and improve

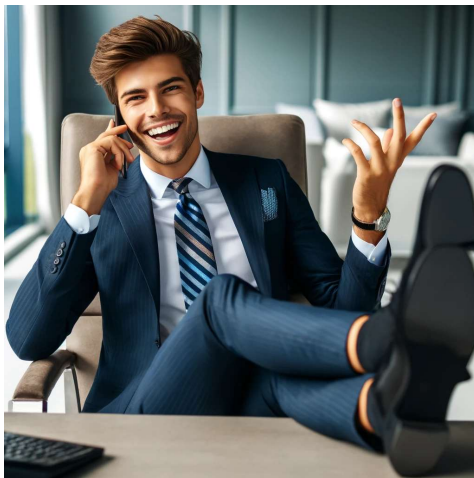
28

Use incentives

..PSG

29

Task your staff with finding ways to make someone else's job easier



30



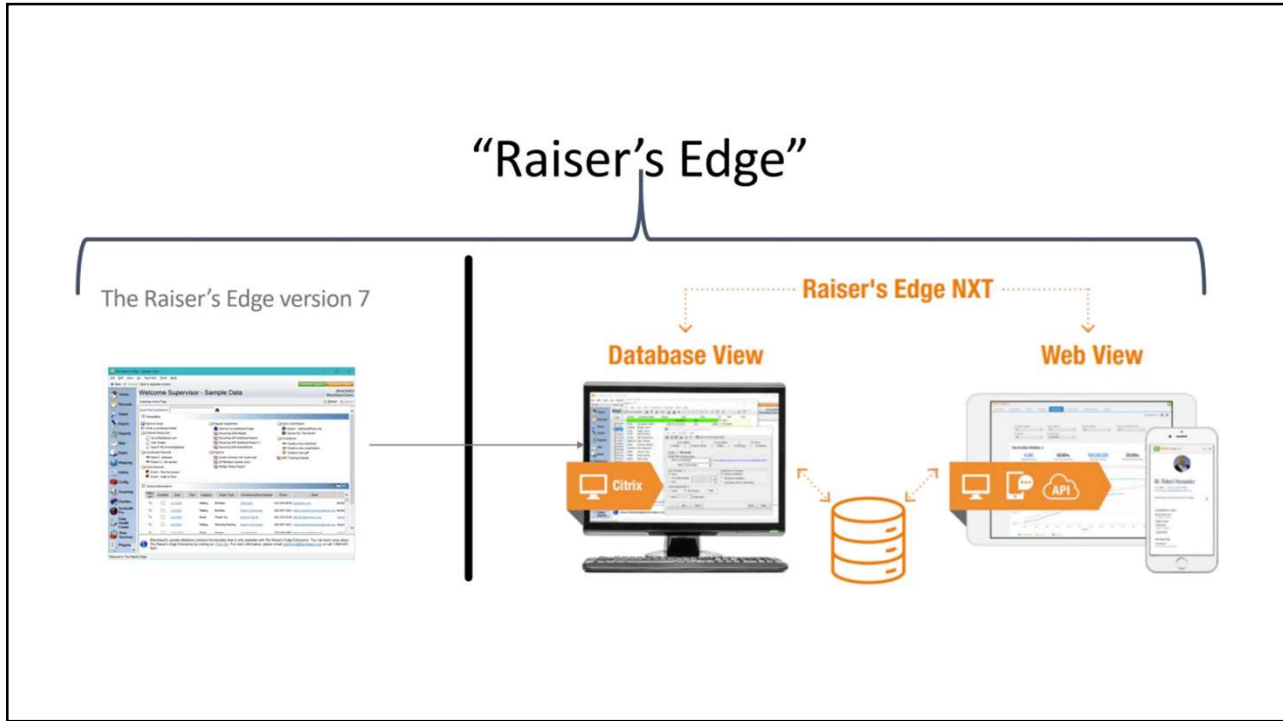
Make use of peer groups within each role

31

How **systems and processes**
can help reduce friction

PSG

32



33



34

Automation tools that will
eliminate friction

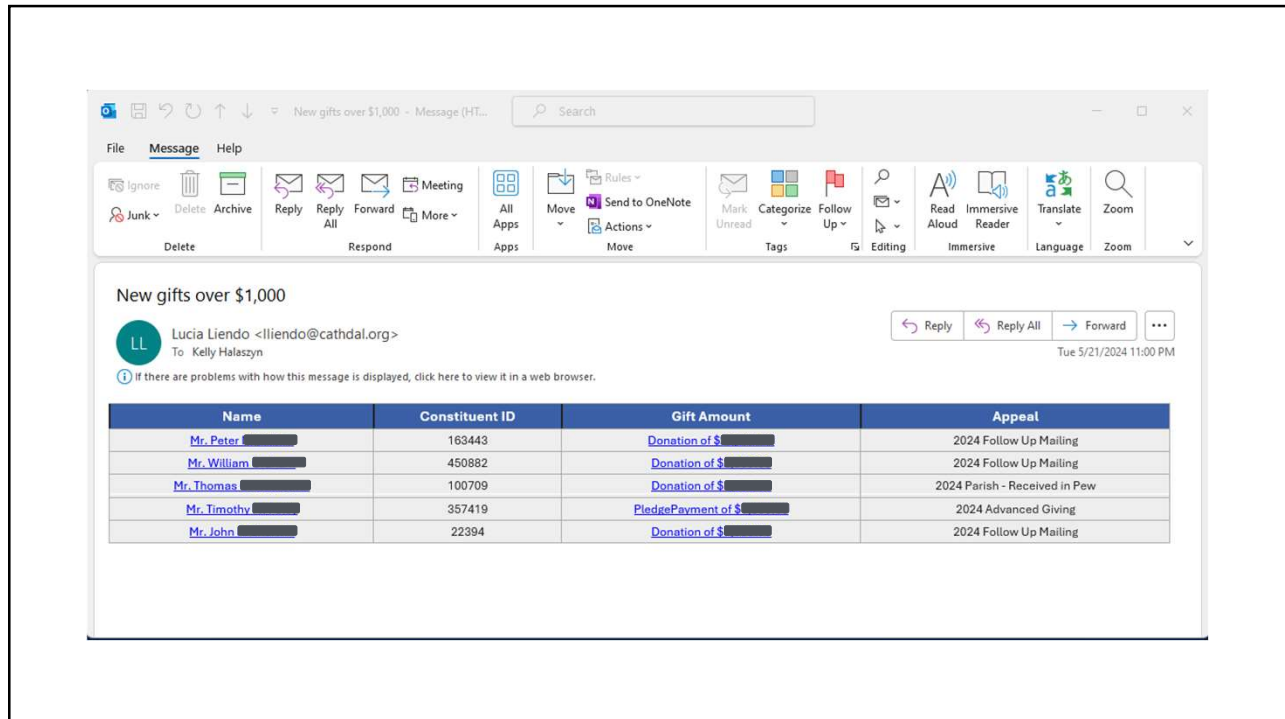
..|PSG

35

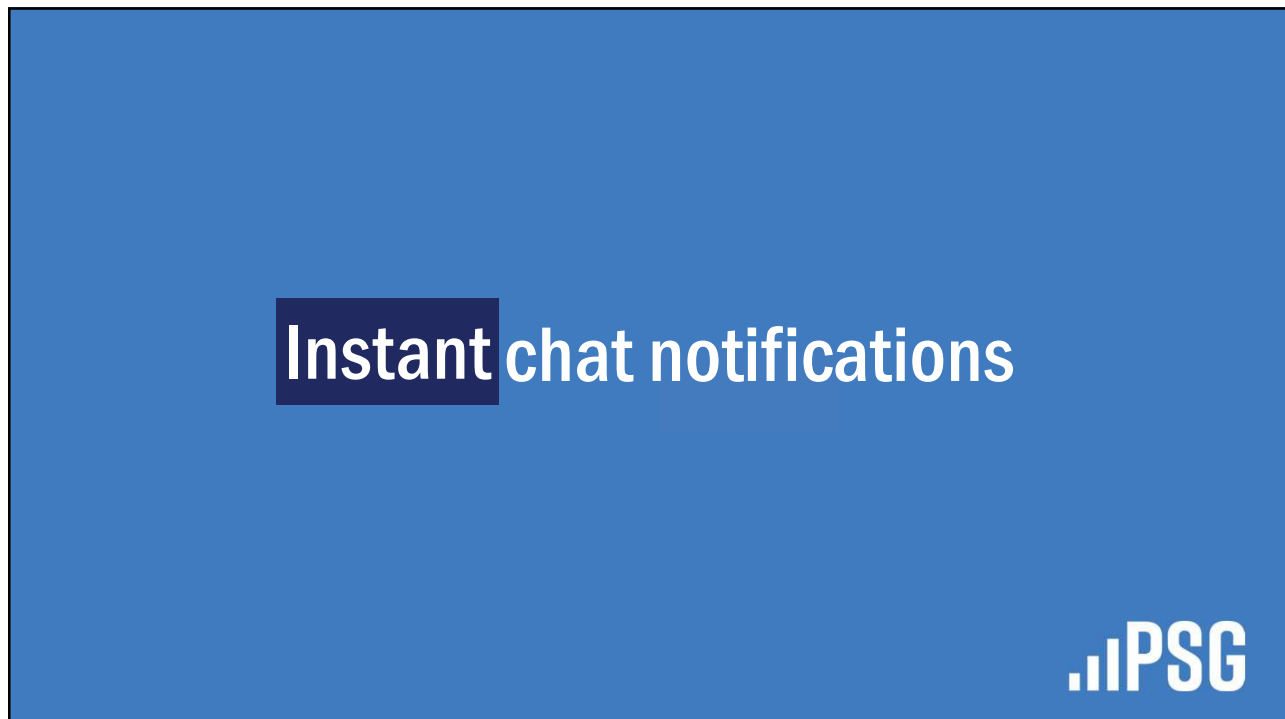
The automatic gift digest email

..|PSG

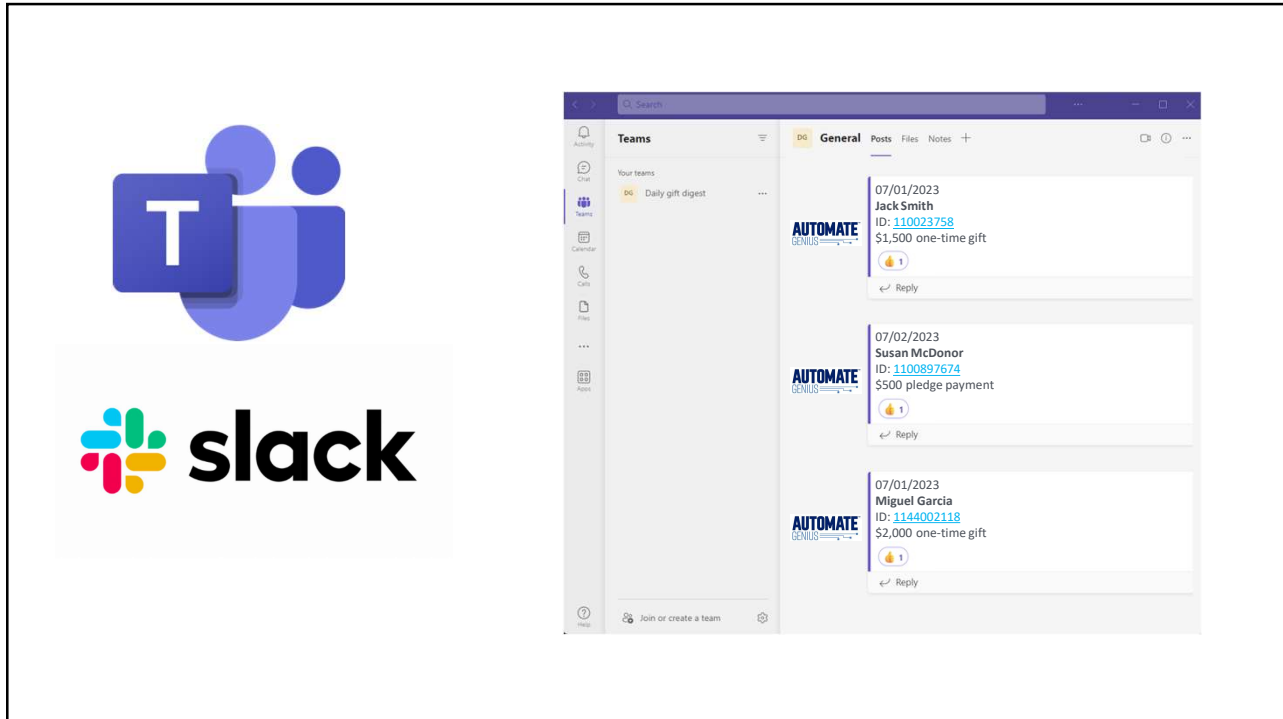
36



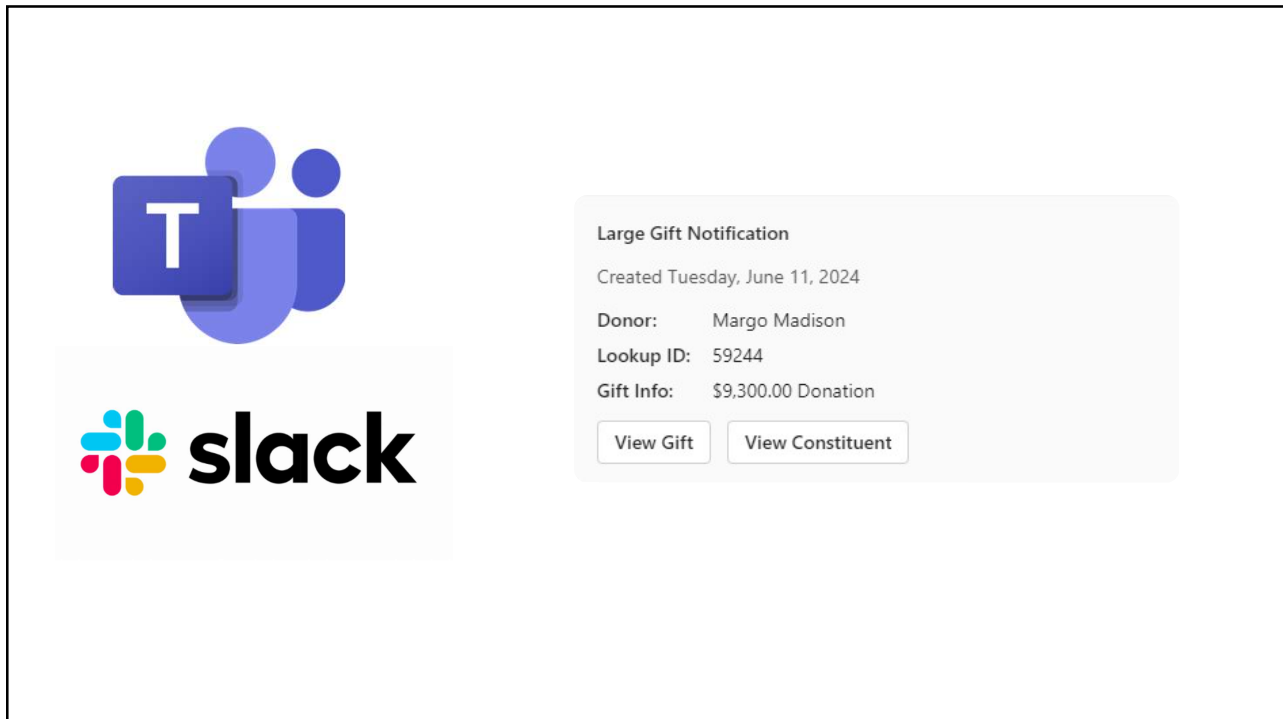
37



38



39



40

The screenshot displays a Power Automate connector interface for 'MP2BB Connector via Power Automate' at 12:01 PM. The interface shows a search for an obituary for a deceased constituent, Charles Salacuse, born 7/18/1932 and deceased unknown, from St. John (Westminster). The search results include a 'Search for obituary' button, a 'Likely match: Charles Salacuse' button, and a 'More information from Ministry Platform' button. Arrows point from these buttons to a web browser showing an obituary for Charles A. 'Chuck' Salacuse and a constituent profile for Charles Salacuse in the Raiser's Edge NXT system. Below the connector interface is a Microsoft Lists table titled 'Ministry Platform Updates' with columns for Contact_ID, Display_Name, Address_Line_1, and City.


Contact_ID	Display_Name	Address_Line_1	City
\$25921	Ryan, Tricia	619 Deerbrook Road	
\$26028	Lee, Pat	8725A Arthur Knight Drive	
\$26182	Salacuse, Charles		
\$26825	Sanni, Corina	119 Highline Road	
\$26826	Sanni, Corina	108 Murdock Rd.	
\$26827	Sanni, Rosemary	108 Murdock Rd.	







41

A solid blue background with the text 'Adding actions' in white, where the word 'actions' is highlighted in a dark blue box. In the bottom right corner, the PSG logo is displayed in white.

42

Please review these past due actions


Stacy Cope
 To: Stacy Cope


 Reply
  Reply All
  Forward
 








Wed 6/12/2024 10:34 AM

🔗 If there are problems with how this message is displayed, click here to view it in a web browser.


You are assigned to the following past due actions. Please review each and either mark complete and add notes, or delete the action record.

Name	Constituent ID	Action	Donor phone number
Elsa I. Boutilier	20	Phone call	(721) 688-9904
Elizabeth A. Brown	14958	Phone call	(402) 555-1212
Ashton U. Aalund	8698	Phone call	
Xiomara L. Bess	3769	Phone call	(308) 867-5309
Skynoodle	255	Phone call	+1 506-857-7315

43


 Raiser's Edge NXT
 Home
 Fundraising ▾
 Marketing ▾
 Events
 Lists ▾
 Analysis ▾
 Tools ▾
 More...
 





Nic Prenger (DBA) Prenger Solutions Group



Xiomara L. Bess

Spouse: [Todd Bess](#)
Fundraisers: [Stacy Cope-Fundraiser](#)

[+ Add summary note](#)

Constituent codes

Alumni

[Add alert](#)
[Apply workflow](#)
[Edit ▾](#)
[Mark as... ▾](#)
[Merge into another record](#)
[Add-ins ▾](#)
⬆ ⬇

Constituent summary ▾

Notes

[+ Add note](#) Any note type ▾

Contact information

[Edit ▾](#) Include inactive


[Addresses](#) [View details](#)







Home ★
 55 Millvalen Buildings

Phone numbers
 Cell Phone ★
 (308) 867-5309

44

Please review these past due actions

 Stacy Cope
 To Stacy Cope


 Reply
  Reply All
  Forward
 








Wed 6/12/2024 10:34 AM

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45


 Raïser's Edge NXT
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 More...
 





Nic Prenger (DBA) Prenger Solutions Group

Phone Call

2/4/2024
Action date

Past due

Constituent: [Xiomara L. Bess](#) Assigned to: Stacy Cope-Fundraiser

[Edit action](#)
[Mark complete](#)
[Delete](#)
[Add to calendar](#)
[Copy to](#)

Notes

1 Note

[Add note](#) Any note type ▾

Added via Web View 2/4/2024

Attachments

[Add](#) Any attachment tag ▾

No attachments found

46

Complete action for Xiomara L. Bess

Raiser's Edge NXT

Phone Call

Past due

Constituent: Xiomara L. Bess

Edit action Mark complete

Notes

1 Note

Add note

Added via Web View

Summary

Call to thank for 2/1/24 gift of \$5,000.00

Please call Xiomara L. Bess at to thank for the above gift.

How did it go?

Completed date *

06/12/2024

Save Cancel

47

Other ways to use automation



48

Other ways to use digests and notifications

1. When a new constituent is added
2. When a new donor makes a gift
3. When a donor increases a gift
4. When someone registers for an event
5. When someone completes a pledge
6. When someone sets up a recurring gift

49

Where this gets **really** useful

PSG

50

Daily digest + *draft an email* link

From: Austen Brown <austen@prengersolutions.com>
Sent: Monday, May 20, 2024 1:54 PM
To: Austen Brown <austen@prengersolutions.com>
Subject: Donors to Email Notification

Please review the following and email these constituents:

Name	Constituent ID	Gift Date	Gift Amount	\$1K+ Gifts this Year	Campaign/s	Fund/s	Action	To Do
Roy Kent	15011	02/01/2024	Donation of \$2,500.00	1	General Operating Fund, General Operating Fund	Blessed Mary Parish, St. Joseph Parish	Link to Action	Create Draft

Austen Brown, bCRE-Pro
Database Consultant, Automation Engineer
[Prenger Solutions Group](#)
[AskGenius | AutomateGenius](#)
743.224.4900



51

Daily digest + a

From: Austen Brown <austen@prengersolutions.com>
Sent: Monday, May 20, 2024 1:54 PM
To: Austen Brown <austen@prengersolutions.com>
Subject: Donors to Email Notification

Please review the following and email these constituents:

Name	Constituent ID
Roy Kent	15011

Austen Brown, bCRE-Pro
Database Consultant, Automation Engineer
[Prenger Solutions Group](#)
[AskGenius | AutomateGenius](#)
743.224.4900



Thank you for your gift!

Good morning Mr. Kent,

I saw that you made a gift to the Diocesan Services Fund, so I wanted to reach out personally to thank you. I sincerely appreciate your financial commitment to Christ's Church, which will allow the Archdiocese to advance Jesus' mission of rescuing humanity to experience abundant life with Him.

When I look out my office window, I can see the grounds of our diocesan seminary, where future priests are formed. I can usually spot a seminarian or two walking across the quad on the way to class or praying with a rosary in hand.

Their presence here is a witness to the power of the Holy Spirit working to fill our parishes with priests to serve at God's altar. I am tremendously grateful to you for your role in making priestly formation possible, which is just one of more than 40 ministries supported by the Diocesan Services Fund.

Please let me know if I can answer your questions about the Diocesan Services Fund or our Church more broadly - feel free to give me a call at (713) 652-4461 or reply to this email.

In Christ,

PLUS it adds an action in RENXT and saves the correspondence

Action	To Do
Link to Action	Create Draft

52



53

Clean up automations

..|PSG

54

Automation ideas to aid with data clean-up

1. Alert when duplicate constituents are created
2. Automatically fill in blank 'preferred' name/nickname fields
3. Mark emails/phones as primary
4. Validate new emails, and alert when email is invalid
5. Allow non-privileged users to submit a record change
6. Update consent records from info in constituent emails
7. Mark records with a blank address as 'No Valid Address'

55

Automation ideas to help with gift processing

1. Automatically run donor acknowledgement letters
2. Provide an email supplement to year-end tax letters
3. Bring data directly from an online census form into RE
4. Alert when a large gift from an unassigned donor is rec'd
5. Alert staff when an opportunity has an upcoming ask date
6. Alert a gift officer when a portfolio donor makes a gift
7. Automatically tag giving circle/society members

56

Learn more about **automation**



57

**Fundraising Automations:
Work smarter, not harder**



AUG. 6, 2024
1:30 P.M. CT



Nic Prenger



Andy Schroeder



Andrew Menke



58

What's coming next




59


• WEBINAR

Setting Up the
**World's Greatest
Recurring Gift
Program**

August 20
1:00 pm CT



Hosted by:
Nic Prenger,
Sarah Aligo,
Stacy Cope



60

• WEBINAR

Tips and Hacks for Creating Reports and Dashboards in Raiser's Edge



September 10
1:00 pm CT

Hosted by: Rob Simms, Austen Brown,
Nic Prenger & Stacy Cope

61



62