Process for Generating Special Appeal Direct Mail Files

The following pages are an example of policy and procedure documentation for a mailing. It is provided by Bill Connors, CFRE, for Blackbaud's Conference for Nonprofits "Creating Effective Policy and Procedure Documentation for The Raiser's Edge" session on Friday, October 22, 2010. Bill can be reached at www.billconnors.com, bill@billconnors.com, and 415.861.5454.

This documentation should be considered in the context and approach outlined by Bill at this session. In summary, Bill believes that first and foremost an organization's documentation needs to record what is unique to that organization and should not be focused on teaching readers how to use The Raiser's Edge— Blackbaud has thousands of pages of documentation to do that. Organization-specific policy and procedure documentation should be written such that a knowledgeable user can come in and continue an established process, such as recurring mailings; it should not be written to teach a novice user how Query and Mail work.

The following example reflects that approach in that it does not explain how to navigate in The Raiser's Edge but simply tells the user the names of the queries and mail export parameter sets to use; the parameters used; perhaps most importantly, why those parameters are used—the fundraising rationale and management direction; and related procedures outside The Raiser's Edge for which a staff person is not going to remember the details over time or that a new user would not automatically know (in this case, working with the organization's direct mail vendor).

This is an example of a "real, live" document in process from an actual organization using The Raiser's Edge, and is not a perfected model but a realistic one (and is shared with permission). It demonstrates what can be reasonably created and updated over time as the person responsible for generating the mailing files runs and documents the process. In the interest of space and usefulness, some details have been deleted. The yellow highlights are a visual reminder of the parameters that need to be updated each time the process is run to create the next direct mail appeal data file. The hyperlinks at the end of the file are an example of cross-linking that can be done on an organization's network but will not point to anything for a Blackbaud conference attendee.

If you were not at the session, more information on the recommendations made during the session can be found in Bill's book Fundraising with The Raiser's Edge: A Non-Technical Guide *(Wiley, February 2010).*

Process for Generating Special Appeal Direct Mail Files

From the Greater Bay Area Make-A-Wish Foundation for Mal Warwick

Notes created June – August 2007 for Challenge/Elephant Match MAW07AB …

Used again for Year-end Appeal MAW07AD. (same as AB and AC except this IS the appeal to send the 1x/year folks)

Criteria for Include Query
- Query named "Direct Mail Include Query for Mal Warwick"

- Constituent query, including both individuals and organizations

- Those who have ever given a direct mail gift as indicated by the criteria of Gifts, Appeals, Appeal Category = Direct Mail (As of 7/6/07, Appeal Category is a required field, the only options are "Direct Mail" and "Not Direct Mail," and Jackie and Bill have marked all direct mail appeals already in the system as Direct Mail.)

Criteria for Exclude Query
Note that some of the necessary exclusions are handled more easily in the Mail parameters in the next section and not in this query.

- Query named "Direct Mail Exclude Query for Mal Warwick"

- Those with a <u>current</u> (current defined by blank Date To or Date To greater than today—<mark>needs to be updated</mark>) constituent code of
    - Monthly Donor
    - Board Member
    - Advisory Council
    - Staff
    - YPAC
    - VIP (note that this is the <u>only</u> field by which we are excluding major donors and prospects; anyone who has given us any amount of money whatsoever that includes a direct mail gift and doesn't have this code will be solicited with this direct mail piece, no matter how much they have given)

- OR Preferred Address Country is one of any value except United States—<mark>check to make sure no new countries have been added</mark>

- OR Well Wisher as defined by any single gift of $500 or more to a Well Wisher or Mini Proposal appeal (there are 6; find with search on *mini and on *well) (due to confusion about how Well Wishers was defined—attribute or giving—this was the decision; we are <u>ignoring</u> the RE attribute for this purpose) – <mark>check to see if any new Well Wisher or Mini Proposal appeals have been added</mark>

- OR Approach Restriction applicable attribute (moved to query because some of the values are inactive and are not available for selection in Mail until I finish cleaning up this attribute) – <mark>1x/year to be excluded? YES for all but May and year-end, so remove from exclusion for May and year-end mailing and add back to mailings after that; there are VIP and non-VIP versions</mark>

- (Jackie says current volunteers should not be excluded)

Merge Query Results
- Query named "Direct Mail Merge Results for Mal Warwick—STATIC!!"

- Running this query takes approximately 15 minutes.

    - … 8/31/07 created a list of 36,428
    - (Sept was the mini proposal and that data is in a diff document)
    - 10/29/07 created a list of 37,103

Parameters for Export Files

There is no single tool in Mail that allows us to:
- Export 3 versions of a name (Addressee, Salutation, Sort Name)
- Use Head of Household processing
- Export address fields as separate fields rather than one address block

Export doesn't allow us to exclude individuals with no good address based on address processing or organizations without a valid contact.

Therefore Mail is used to produce an output query that is plugged into the constituent and gift exports.

Parameters for Mail, Quick Letters for Constituent Data

- Parameters named "Direct Mail Constituent Data for Mal Warwick"

- General:
    - Query: need merge subtract query of the two queries above
    - Will use Head of Household processing
    - Exclude Inactive, Deceased and Has no valid address
    - Create output query selected to be used to generate gift file
- Fields:
    - Constituent ID (file is created only to generate query)
    - Address Line 1 (to ensure address criteria gets processed)

- Filters: Exclude those with a Solicit Code of – update based on the time of year and relevance of 1x/year mailings—and don't forget to add back for next mailing after removing this
    - Direct Mail 1x/Year Only (this isn't the one those folks should receive),
    - Do Not Mail Anything (had the RMT attributes of No Mail *and* No Newsletter),
    - No Direct Mail (RMT Attribute No Mail)
    - Renewals Only for Direct Mail (RMT Attribute Renewals Only; this isn't a renewal mailing)
    - Do Not Solicit

- Attributes: Exclude those with a relevant Approach Restrictions attribute (not from RMT but still applicable to a direct mailing) now handled in Exclude query

- Individual Address tab:
    - Use Seasonal address as of [date based on mailing]
    - Otherwise preferred address
    - Remove from mailing if no valid address is found (NCOA will not be performed in advance)

- Organization Address tab:
    - Contacts: use Primary first, RMT second
    - Only send one per organization, NOT one per contact
    - If the contact also personally qualifies, they will get one to their personal address and one to their contact address
    - Remove from mailing if a contact is not available

- File exported to R:\Export Files Temp Folder.
    - 7/25/07: 34,670 constituents
    - 8/7/07: 34,692 constituents
    - 8/31/07: 34,727 constituents
    - 10/29/07: 35,501 constituents

Parameters for Export for Constituent Data

Saved parameters are named "Direct Mail Constituent Export for Mal Warwick."

Character-separated filed using the ^ as the separator per Margo at MW's request.

The input query here is the output query of the <u>Quick Letters</u>, not the merge query!

The fields selected are:

- o Constituent ID
- o Key Indicator
- o Sort Key (by constituent name; so org name for orgs, not contact name)
- o Addressee
    - Individuals: Use Primary Addressee
    - Orgs: Leave blank
    - Contacts: Use Main Constituent Only Addressee if present otherwise use the Primary Addressee
- o Salutation
    - Individuals: Use Primary Salutation
    - Orgs: Leave blank
    - Contacts: Use Main Constituent Only Salutation if present otherwise use the Primary Salutation
- o Position
- o Organization Name
- o Address Lines 1-5 separately <mark>(Update Seasonal address date based on actual date of mailing)</mark>
- o City
- o State
- o ZIP
- o Country (including for now at Margo's request although international addresses are being excluded)
- o Contact Addressee
    - Use Main Constituent Only Addressee if present otherwise use the Primary Addressee
- o Contact Salutation
    - Use Main Constituent Only Salutation if present otherwise use the Primary Salutation

<mark>Be sure to include the project code in the file name per MW's request.</mark>

10/29/07: 7 minutes to run the export

For more understanding about this process, see email below sent to Mal Warwick 8/7/07 by Bill Connors: …

Parameters for Export for Gift Data

Saved parameters are named "Direct Mail Gift Export for Mal Warwick"

Character-separated filed using the ^ as the separator per Margo at MW's request.

The input query here is the output query of the <u>Quick Letters</u>, not the merge query!

There is Gift Criteria built into the export to include only Cash, Pay-Cash and Recurring Gift-Pay Cash. (Right-click on the name of the export in the Output display to select the Criteria button.)

<mark>Be sure to include the project code in the file name per MW's request.</mark>

Uploading Data

Uploading Data to Mal Warwick

Instructions provided by Mal Warwick staff:

1. In your web browser, go to www.malwarwick.com and click on "Client Login." …

Notify by Email of Upload …

Marking Appeals and Packages on Constituent Records

Mal Warwick will send back to us the Cons ID with the Appeal and Package each constituent received for importing to the Appeals tab of each constituent.

Specifically (per Margo 8/07): "Also, to clarify, what we (she) will send you at conclusion of the job is a cross-reference of idnumber with the full RMT keycode. If you need to separate out Appeal and Package components from that keycode you'll need to take care of that on your end."

There is an Access database in the Direct Mail folder in the R: drive which illustrates how I easily created the import file and analyzed the codes received. I just used the standard import saved parameters to import them.

- Note that if the file is saved as an Excel file Access will add decimal points to the export of the Cons ID. <u>So, be sure to save it as a CSV file and when linking be sure to specify the data type as Text and don't use the default of Long Integer.</u>

In order to set up the appeal and packages in RE and add them to the constituents, find out the following information as well:

- Mailing name and purpose for the Appeal Description and notes
    - See previous mailings in Appeal for consistent names and descriptions
- Date mailing will be dropped
- Number solicited
- $ Goal and if desired, expenses for reporting and analysis purposes
- Meaning of the various package segments; for example, see analysis below from the 8/07 mailing:

…

For the answers to this discussion, see:
- Mal Warwick Package Code Explanation - Donor Value Keycode chart.xls
- August 2007 Package Code Breakdown.txt

Also note that Sarah Clautero shared the plans and projections for 2007 and 2008:

- MAW2006 2007 projections v2 update qty's on renewals.xls
- MAW 2008 projections to client for approval.xls