

Managing the “Manager” Part of Database Manager in the Fundraising Profession Today

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Three incidents from the
summer of 2018...

It is not the fundraising
database administrator's job to
sit in their office and run
reports, lists, and mailings...

Is this just a job for you, or do you care about your organization and its mission?

Introduction

- The background and perspective I bring to this discussion
- Not database- or vendor-specific
- “Fundraising database,” “CRM,” ...
- Intended for small and mid-sized organizations of all types
- Concepts and principles about our roles and place, not technical
- I’m *not* saying I’m perfect at this and don’t have struggles; this is what I strive to do
- Invite conversation and involvement

Agenda

- The problem
- Why it's a problem
- Database roles
- Responsibilities of the DBA
- The effect of the cloud
- Why we have this problem
- How it gets fixed
- 5 tips for fixing it
- Post-conference resources to read and consult

The Problem

Fundraising database administrators are treated like, and act like, support personnel there to respond to the needs and whims of the fundraising and other staff to get data in and get it out where and when told

Why Is This a Problem?

This is more of a description (though less than perfect) of the role of *power users*, not the job description of *database administrators*, and so the result is often that the job of database administration doesn't get done

Database Roles

Typical roles (not jobs) in database use:

- Gift and constituent entry and updates
- Data entry management
- Power user
- Database administrator (and backup)

Depending on the size of the organization, more than one of these “hats” are often worn by a single person

But data entry and data management are often not the best combo

Responsibilities of the DBA

- Liaison with the vendors (invoice, support, updates, sales...)
- Have a good sense of the marketplace (social media, third parties...)
- Liaison with other departments (Finance, IT, HR, Registrar...)
- Security (technical and database)
- Documentation
- Staff use and training
- Setup and configuration of the database (show some care!)
- Maintenance of the data and database and oversight of proper use
- Integration of the database and data with other systems

In the Age of the Cloud

- Software is more accessible, easier to use, more powerful, more oriented toward the needs of fundraisers and managers
- The fundraising database is no longer a “back office” system only to be used by “back office” “support” staff. It is a tool intended to be used by every person in the fundraising shop, including—especially!—the fundraisers, including the top fundraiser/leader/manager
- We have more computer-literate colleagues than ever
- We have an overabundance of technical options in the contemporary fundraising operation...giving platforms, email, events, auction,
- The DBA’s job is to oversee the successful implementation and use of the fundraising software and data by all users in the office

Therefore...

This is a role that will never be “done,” “all caught up,” etc.

This is not a job about getting it all done, this is a job about getting the right and best things done

It's your job to get the right and best things done

So...

Who's doing these things if the "DBA" is busy running reports, making lists, preparing mailings, and doing the occasional import all the time?

If the "DBA" isn't doing these things, who is?

These are the DBA's role, no one else's.

Why We Have This Problem

Fundraising management and staff

- History of fundraising data management
- The Peter Principle
- Lack of training and education
- It's true of executive, finance and other leadership and staff, too

DBAs have inherited this way of thinking

Why We Have This Problem

It is reflected in the ways

- We are thought about, talked about, and treated
- We think, talk, and act

Therefore it has become a self-perpetuating cycle that needs to be broken

Admittedly, it is a hard job that requires a combination of hard and soft skills difficult to find in one person

How This Gets Fixed

1. It must start with us, it's not likely to start with fundraising leadership
2. We must learn to manage up and educate our managers
3. We must insist these responsibilities be added to our annual accountabilities and we be measured accordingly
4. We must insist we take the time to work on these responsibilities
5. We must learn to manage out and educate our peers
 - Fundraisers
 - Develop a team of power users

How This Gets Fixed

6. We must insist our peers work with us accordingly
7. To do this, we need to learn soft skills and hard skills other than just technical, database skills; for example, learn how to
 - Triage
 - Prioritize
 - Say “No” or “Not now” or “Let me teach you how”
8. We must be included in meetings, processes, and decisions that involve data
9. We must be ready to leave and let leadership know why we’re leaving

Tip 1: Change Our Titles

Database Administrator

Database Manager

Data Manager

Data Leader

Database Manager

Tip 2: The Four Lists

In order of priority:

1. Daily Maintenance Log

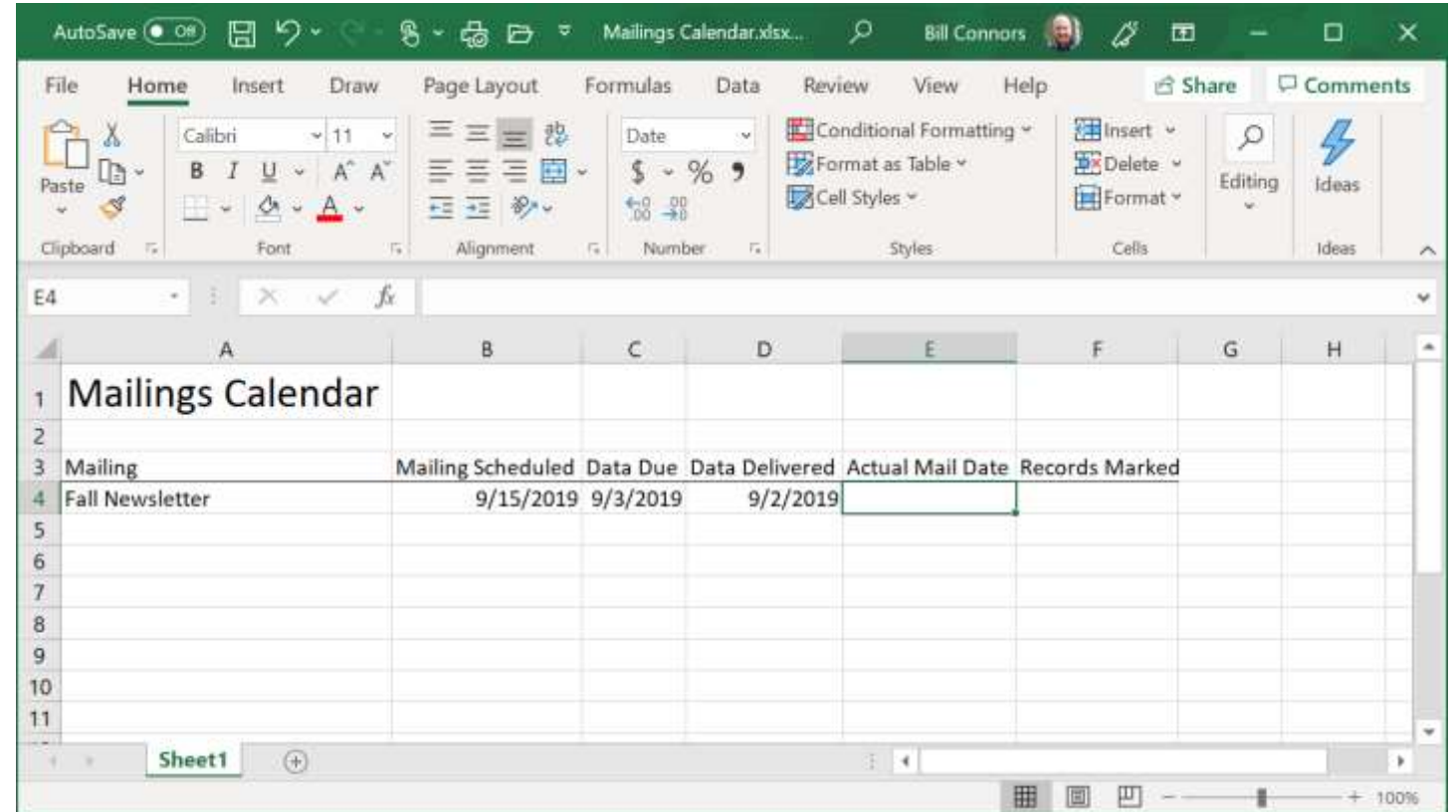
The screenshot shows an Excel spreadsheet with the following structure:

		Date task added to List	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	
1	Maintenance Tasks for The Raiser's Edge for GBAMAWF										
2											
3											
4	First week of every month										
5	Last of the month	Download and enter the Kintera money for the second half of last month—Isabella now does									
6											
7	Monday	ASAP distribute the weekly fundraising performance email. (Verify that Friday's gifts have already been entered.) Review constituents added the past week and discuss with staff any mistakes found. Use the query: Maintenance: Checking New Consts Download from Wish Café last week's internet donations and provide to DA									
8		Do a search for "The", "A" and "An" where backslashes were not used properly, fix the records, and remind the staff person who added them.									
9	Tuesday	Check Yearly list Run query "Maintenance: Gifts Not Acknowledged" and address any results found. Run query "Maintenance: Gifts Marked Do Not Acknowledge" and review gifts to ensure all those marked Do Not Acknowledge have been properly marked this way. Run query "Maintenance: Nonfourt Letters Not Acknowledged" and address any results found.	8/4/2007								
10		Refresh the static QUERY named "Weekly Report on Top Gifts." Then run the report (Fin Rpts, Gift Detail Report) named "Weekly Top Gifts Report", save as PDF to the Weekly Reports folder, and send email to staff with the attachment. Identify issues on the report and work with stop to get them fixed and avoid the problems in the future.	5/2/2008								
11	Wednesday	Send Mal Warwick the Flashcounts export: Use the "Mal Warwick Flashcount Export" and use the dates of last Wednesday through yesterday (Tuesday of this week) to avoid overlap or missing gifts. Save to G:\Raiser's Edge\Mal Warwick Flashcount Weekly Files. Email file to data@malwarwick.com 9/7/07. Sarah C in Development is doing this now.									
12		Distribute the Past Due Pledge Report and Past Due Recurring Gifts Report and clean up gifts based on response; be sure to get responses for each pledge over 30 days due (Reports, Pledge and Recurring Gift Reports, Past Due Report, "Past Due Pledges (all) as of today" parameters—no changes to parameters necessary, just run and email as PDF)									
13		Run the query "Maintenance: Appeals that should not be blank" and identify gifts that should have been given an appeal that don't have one. Prepare Adjustment Forms and give to the DBA for gifts on this list (added 10/30/07)									
14	Thursday	Run the query "Maintenance: GIKs not matching GIK Funds" and work with users to rectify discrepancies Run the query "Maintenance: No Primary Addressee or Salutation" for individuals and contacts and clean up records. Note that this query takes a while to run because of complicated criteria, but don't worry about that—just wait a little while. Notify staff who added of their mistakes and provide direction (focus on more than just the obvious).									
15		Short weekly tip to staff about using RE									
16	Friday	Run the query "Maintenance: Constituents without Cons IDs" and fix (should not happen since required field, so notify DBA as well) Review constituents and addresses changed the past week and discuss with									
17											
18											
19											
20											
21											
22											

Tip 2: The Four Lists

In order of priority:

1. Daily Maintenance Log
2. Mailings Calendar



The screenshot shows the Microsoft Excel interface with the 'Mailings Calendar.xlsx' file open. The ribbon is set to 'Home'. The spreadsheet content is as follows:

	A	B	C	D	E	F	G	H
1	Mailings Calendar							
2								
3	Mailing	Mailing Scheduled	Data Due	Data Delivered	Actual Mail Date	Records Marked		
4	Fall Newsletter	9/15/2019	9/3/2019	9/2/2019				
5								
6								
7								
8								
9								
10								
11								

Tip 2: The Four Lists

In order of priority:

1. Daily Maintenance Log
2. Mailings Calendar
3. Dated Projects

Tip 2: The Four Lists

In order of priority:

1. Daily Maintenance Log
2. Mailings Calendar
3. Dated Projects
4. Projects To Do When There's Time

Store them in an easily accessible and shared location

Tip 3: Dealing with Special Requests

- Just because someone asks for something, even your boss, does not mean you just have to sit down and do it
- Perhaps ironically, in fact, that's not how you earn respect. You earn respect by showing knowledge, skill and wisdom
- Asking questions is okay! “What are you trying to accomplish?” “What's your end goal?”
Understand the objective and need
- Let them know cost and time
- Propose alternatives
- Use your manager to back you up; that's what they're there for

Tip 4: Be Part of the Solution

Feedback from a fundraising manager about a DBM she loved

- He attended meetings
- He asked questions
- He proposed alternatives
- He was technically sophisticated
- He didn't see problems, he saw opportunities such as when people asked for things
- She trusted him and enjoyed working with him

Tip 5: Think Big Picture

Taking care of the **database** *is* taking care of your users

Taking care of the **organization** *is* taking care of your users

Taking care of **yourself** *is* taking care of your users

Conclusion

It's not just about how we want to be treated, it's also about how we act.

If you do not want to do these things, that's okay, but let your organization know so they can hire someone who will be the DBM.

Resources 1

Here are some articles and posts that might help with the workshop you're considering. You're welcome to use them with attribution.

[*Going from Accidental Techie to Technology Leader*](#)

[*Becoming an Advancement Services Leader*](#)

[*Making the Case for Advancement Services*](#) (similar to the last one)

[*Ingredients of a High Performing Advancement Services Shop*](#)

[*Best Practices for Managing a Database*](#)

[*Top Issues Affecting Advancement Services*](#) (this is from 2007 but the issues are evergreen)

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Resources 2/Contact Info

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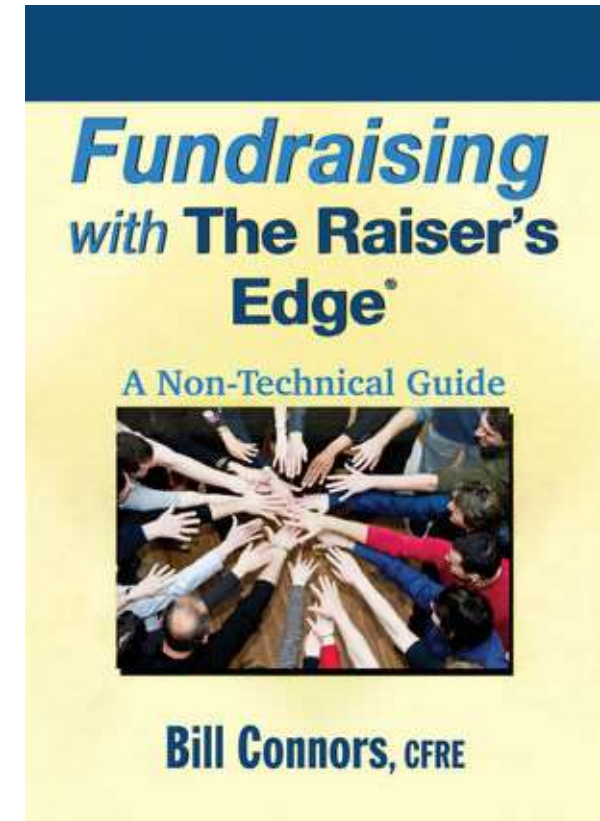
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-THANK-YOU!

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