Index

Accountability, clarification, 165
Account types, 194
Accuracy, meaning, 21, 70
Account, complete, and timely (ACT) approach, 35–36
Address
types, 214
verification services, 30
Addresses/salutations, 214
Ad hoc reports, usage, 185
Advancement
division, term (usage), 6
term, usage, 3–4
Advocacy, 138
Alumni (alumnus/alumna), 215
relations, 104
term, usage, 3
Always Be Comparing (ABC), 146
American Recovery and Reinvestment Act of 2009, 95
Analytics, 86–88, 124–127
advances, 143–148
definition, 87
processes, usage, 88
project, example, 87–88
Anecdotal information, usage, 39–40
Anecdotes
impact, 208
management plan, 28
manager usage, 26
solution, 25–28
Annual giving, 103, 104–105
operations framework, 106
Annual restricted, 215
Annual unrestricted, 215
Antispamming regulations, 97
Appeal, 215
Application service provider (ASP), 139, 140, 222
Arbiter/advocate
functions, 53
roles, 52–68
Assignment strategy, defining, 198
Association for Healthcare Philanthropy (AHP), 93, 122
Association of Donor Relations Professionals (ADRP), 92
Association of Fundraising Professionals (AFP), 37, 122
Code of Ethical Principles and Standards, 231
Association of Professional Researchers for Advancement
(APRA), 79–80
Statement of Ethics, 127
Attribute, 215
Automated data processes, usage, 82
Balance, leader maintenance, 44
Balanced fundraising operations framework, construct, 6–7
Baseline policies, 198–199
Batch, gift processing evaluation stage, 73
Behavior issues (solution), conversions (usage), 180
Benchmarks, 208
development, 27–28
Benefits, events (relationship), 109–110
Best practices, 208
contrast, 76
defining, 72
Blank fields, replacement, 30
Bleeding edge, 116
Branding, 78
Business associated agreements, 95
Business contact information, loss, 178
Business intelligence (BI), 144, 222
options, usage, 11
tools, 130
Business process, cleaning, 59–60
Campaign, 215
assumption, 12–13
giving
donor type, 187t
range, 186t
management, reports (types), 184–189
planning, early stages, 81
CAN-SPAM Act of 2003, 97, 136, 222
Capacity indicators, indication, 194f
Career-pathing, 152–156
Charitable gifts, GivingUSA tabulation, 133
Check number, 194
Children’s foundation, data (example), 22–23
Children’s Hospitals and Clinics of Minnesota, front-of-
the-line process, 21, 24
Client-server installations, hosting services (vendor outsourced), 156
Codes, creation, 197
Coding, incongruities, 177
Collegiality, 200
Commitments, cumulative value per donor, 186
Communication skills, 43–44, 199
Compliance, 92–98
issues, fundraising operations team management, 93
opinion, consideration, 94
understanding, third-party industry experts (impact), 93–94
Concern, gauging, 27f
Constituency code, 216
Constituent relationship management (CRM), 222
consideration, reasons, 137–138
systems, 31, 137–139
online contract, 66
Constituents, 216
consideration, 117
CRM-type resources, 139
data, fundraiser delivery, 120
database, 32–33
Constituents (continued)
engagement programs, 104, 107
operations framework, 108t
living deceased classification, 178
reaching, online tools (usage), 134f
relationships, building, 88
term, usage, 3
virtual mobility
evaluation, 131–132
relationship, 128–129
Consumer data, 124–127
Contact, 216
Contributions, receipt, 212
Conversion, 32, 59–62
expense, 180
implementation, equivalence, 178
parallel processing, 178
process, myths, 178–180
transition, term (replacement), 52–53
Costs, benefits (contrast), 117
Coughlin, Kay, 92
Council for Advancement and Support of Education (CASE), 37, 74, 122–123
Currents (magazine), 116–117, 135
Council for Aid to Education (CAE), 37, 74
Creativity, usage, 49–50
Cross-cultural staff members, impact, 10
Cross-tabulation reports, 184
Cultivation cycle, 84–85
Current restricted, 215
Current unrestricted, 215
Data, 18–31, 176–178
accessibility, 122–124
accuracy, verification, 178
analysis, 143–144
appending, 30
availability, 69
bottlenecks, 22
cleanup, reasons, 60
conversion, programming, 60–61
cubes, 144–145, 222
dictionary
appearance, 189
development terms, 214–219
sample, 211
usage, 184
enhancement
options, awareness, 29–30
techniques, team leverage, 29
entry exception log, 180t
exception log, appearance, 180
extraction, 61
impact, finding/usage (value), 154t
leverage, fundraising (impact), 80
maintenance, 68–70
tactics, value, 31
marts, 144–145, 222
mining, 145, 223
perception, importance, 28
points
assessment, sample, 71f
sale, 125
problems, signs, 176–178
process, cleaning, 89–60
programming, technical tips, 60–61
quality
calculator, 179f
measurement, 71f
services, 156
speed, 21–24
balance, 19f
ubiquity, 122–124
updating tactics, value, 31
usage, 16
visualization, 145, 223
volume, 24–25, 122–124
balance, 19f
struggle, example, 24–25
variation/cyclicality, 25
warehouses, 144–145, 222
Data accuracy, 19–21
balance, 19f
meaning, 21
measurement stick, 70
Database
implementation, effectiveness, 181, 181f
Database, conversion, 32
Data-based project, development, 92
Deceased, 216
Decisions
advice, 161
improvement, 13–14
Degrees, 216
Development
executive, example, 162
term, usage, 3
Digital imaging, 140–143
Discipline, 200
change, 147
Division I University, advancement leadership, 167–169
Dolan, Tim, 162
Donation, interest, 211–212
Donor, 217
bank, identification, 194
behavior, consideration, 117
Bill of Rights, 127, 232
checks (assessment), gift processing (usage), 194
database, time-intensive profile generation, 84
records, inaccuracy/incompletion, 176
relations, elements, 89–90
Donor-centered fundraising, 196
Donor-driven fundraising, 196
Downsbrough, Bruce, 169–170
Early-adopter advantage, 116, 146
Email addresses, inaccuracies/loss, 176–177
Endowment, 217
Engagement, 138
management, 65–66
Enterprise resource planning (ERP), 138–139
Entry, gift processing evaluation stage, 73
Ethics, 124–127
Events, 104, 107–110, 217
benefits, relationship, 109–110
operations framework, 109t
Evolving technologies, applications (usage), 136–143
Exception management, 26, 28
Executives
decisions, making, 172–174
Executives, confidence levels, 17t
Expectation management, 65–68
Expectations, 138
experience, impact, 166
External relations team, 6
Extract, transform, and load (ETL), 145, 223
Internal Revenue Service (IRS), publications, 94, 110, 221
Internet applications, impact, 131–132
Interpretation skills, 200
iPhone expectation, 119
Key, Roby V., 167–169
Key performance indicators, creation, 72
Language, usage (consistency), 189
Last year, but unfortunately not this (Lybunt), 217
Leadership
collegiality/persuasion, 46
placement, 163
records, inaccuracy/incompletion, 176
skills, 43–44
Logistics, impact, 137
Lost constituent searches, 30
Lybunt, 217
Mailing list, 217
Major giving, 103, 104
operations framework, 105t
Management by walking around (MBWA), 26
Managers
anecdotes, usage, 25–28
mobility, relationship, 130–132
Matching gift, 213
Meetings sessions, establishment, 198
Membership relations, 104
Mobile devices, 136–137
Mobility, 127–132
constituents, relationship, 128–129
manager, relationship, 130–132
team/virtualization, relationship, 129–130
Multilingual staff members, impact, 10
Multiple gift parameters, 212
Multitasking priorities, 200
MySpace, problems, 118–119
National Association of College and University Business
Officers (NACUBO), 74
National Change of Address (NCOA), 29–30, 221
National Survey of College and University Parents
Programs, 96
Negotiation, 59
Net worth, absence, 83
New donor, 217
New staff, considerations, 148–158
Nondonor, 218
Nonprofits
programs, 103–104
third-party applications, importance, 132
Nonsolicitation activity, 5
Numeric aptitude, 199
Obama campaign, cost, 118f
Obama effect, 117
Objective feedback, location, 168
Objectives, 197
Office phone system, learning, 131
Online Analytical Processing (OLAP), 145, 223
Online Transaction Processing (OLTP), 145
Open Stream API, 126
Operational harmony, 206f
Operations
arrangement, comprehensiveness, 98
components, importance, 17t
environmental factors, impact, 8–13
environments, 168
framework
components, 5f
imbalance, 6f
fundraising executive valuation, 42
impact, 10
impact measures, creation, 151f
improvement, 16
Leadership, 43–46
maintenance, 147
names, 4
organizational factors, impact, 8–13
organizational type, impact, 10
perception, importance, 17
productivity, confidence, 4
professionals, confidence levels, 17f
report, impact (sample), 153f
staff performance assessment, 201–204
staf survey, appearance, 194–196
survey, sample, 195f
term, broadness, 2
Operations team
benefits, 140–142
data maintenance process, 70
impact measures, calculation/establishment process, 189
preparation, 61–62
prioritization, assistance, 67–68
speed-based expectations, achievement, 23
time, zero-sum game, 23
virtualization/mobility, relationship, 129–130
Operations team members
characteristics, 199–200
discipline, 48
listening/interpreting, 47–48
new positions, signs, 200–201
skills, requirement, 46–50
transition refusal, 64–66
work, remoting, 131
Opinion, consideration, 94
Organization
data, 18–31
addition, costs/impact, 176t
enhancement/development, 28–31
maintenance, 68
division names, 4t
improvement, research profile process (usage), 83–84
maturity, 11–12
measures, 27
operations, foresight/work (benefit), 11
out-of-the-box/vanilla installation, 180
planning/resource availability, matching, 81–82
size, 8–9
structure, 9–10
title, issue, 4
type, impact, 10
user transaction, social media (usage), 132
Other duty as assigned, research, 80
Outcomes, achievement, 197
Out-of-balance data issues, 6
Outsourcing, 156–157
Parent, 218
Parent fundraising efforts, 96
People, 41–50
information, 126
knowledge/understanding, 42
usage, 16
Perception, difficulty, 29
Performance considerations, 148–158
indicators, adoption, 198
management
  maturity model levels, 202t
  model, 150
  model survey, 203
measurment, 149–150
measures, application, 150
reports, 38–39, 184
Performance Management Maturity Model (PMMM), 166–167
Personal Information Protection Act, 98
Personal Information Protection and Electronic Documents Act (PIPEDA), 97–98, 222
Personalized stewardship, fundraising operation support (requirement), 90–91
Pesch, Theresa (Children’s Hospitals and Clinics of Minnesota Foundation), 163–164
Phone numbers, inaccuracy/loss, 176
Pipeline, 85
reports, 184
  sample, 185f
Planned giving, 103
Pool, 85
Pool reports, 184
Porttble skills, cultivation, 165
Portfolio, 85
reports, 184
Predictive modeling, 145, 223
Priorities, balancing ability, 44
Prioritization, expectation management (impact), 67–68
Privacy
  differences, 69
  regulations, 198
  variation, 69
security, relationship, 95–97
Privacy Rules, 95, 112
Private banking client, 194
Problem
  isolation, 205
  plotting, 205–207
  solution, 207
  starting points, 207–209
  usage, 49–50
Processes, 156, 189–199
  effectiveness, fundraising executive evaluation, 39–40
  limitations, 90
  responsibilities, 39–41
  usage, 16
Program reports, 38
Program support, 103
Progress report, 184
  charts, sample, 35f
  tables, sample, 20t
Project data, 123
Prospect development, 79–88
  fundraising operations team responsibility, 79–80
  Prospect information, tracking, 85
Prospect management, 84–86
  baseline policies, 198–199
  guidelines, focus, 197
  implementation, ten-step plan, 197–198
  objectives, 197
  outcomes, 197
  reports, types, 184–189
  roles/responsibilities, 85f
  system
    charter, 196
    initiation, 196–199
    Prospect manager (PM), 218
    Prospect profile, sample, 188f
    Prospect reports, 184
    Prospect research, 84
    expectations, 81f
    protocols, usage, 80
    screening, replacement, 82
  Pulawski, Christina, 164–165
Purchase Card Information Data Security Standards (PCI DSS), 96, 221
Quick response codes (QRCs), 137
Real Simple Syndication (RSS) feeds, 138
Recognition reports, 39
Records
  duplication, 177
  obsolescence, 177
  Regulations/controls, 74
Relationship, 218
Remote access, installation/usage, 131
Reporting, 34–39, 75–79, 182–189
  access/responsiveness, 79
  accurate, complete, and timely (ACT) approach, 35–36
  advances, 143–148
  data volume, relationship, 124
  environment
    comparison, 146–148
    fundraising operations, development/maintenance, 76
    qualities, 182–184
    examination, 77
    quality, 35–37
    transition cycle, 61
  usage, 16
Reports
  catalog, usage, 184
  creation, 198
  format/branding, 78
  prioritization format, 78t
  types, 37–39, 184–189
  Request processes, 189
Requirements/framework, executive role, 55–56
Research, 80–84
  process, team evaluation, 82
  profile process, usage, 83–84
Resources
  adoption, 147
  implementation, opportunity costs, 147
  Resources, access, 139–140
  Results-Only Work Environment (ROWE), 157–158, 223
  approach, benefit, 158
  Return on investment (ROI), measurement, 150–152
Roles
  clarification, 165
  creation, 197
  Rollout period, defining, 198
Sabotage, 66
Satellite offices, impact, 10
Schnabel, Paul, 172
Scholarship reports, creation (components), 91f
Scorecard
  executive value, 56, 59
  sample, appearance, 182

INDEX 235
INDEX

Scott, Rob, 171–172
Screening
  implementation plan, requirement, 83
  problems, 83
replacement, usage, 82
Security, privacy (relationship), 95–97
Selection process, executive role, 54
Service orientation, 46–47
Shadow databases, executive awareness, 64
Shared definitions, 78
Short Message Service (SMS), 97
Side systems, cause, 66
Single gift parameters, 212
Skype, usage, 130
Smartphone, retrieval/learning, 130–131
Social media
  inform, 132
  mania, 132–135
  Hype Cycle, impact, 135
websites, fees, 159
Software-as-a-Service (SaaS), 66, 127, 139–140, 222
Solicitation, 84
Solict codes, 218
 Solicitor, 218
Some year, but unfortunately not this (Sybunt), 219
Sort key, 218
Special constituencies, 104, 110–114
Special initiatives, 104, 110–114
  operations framework, 111t
Species survival plans (SSPs), 128
Speed
  benefit, 141
  imaging, alignment, 140–141
  maturity, relationship, 166
  Speed-based expectations, achievement, 23
  Spousal records, confusion/loss, 177
  Spouse, 218
Staff, 199–204
  roles, defining, 197
Staffing, fundraising budget, 9
  Standard exclusions, 218
  Standard Query Language (SQL), 145, 223
  Stay plans, 152–156
  focus, 155
  impact, 155–156
Stewardship, 84, 88–92, 218–219
  components, 89
  evaluation, framework, 89f
  people-focused elements, 90
  processes, complexity, 91
  Stoic approach, 159–160
Story, sharing, 138
Strategic action, 182
Strategy
  change, 147
  sessions, establishment, 198
Success
  measurement, 72
  measures, 69–70
  Sybunt, 219
System limitations, 90
Technical aptitude, 199
Technology
  adoptsion, 63f
  change, 208
  evolution, applications (impact), 136–143
  exploration, 12
  management, 51–68
  need determination, fit-gap table (usage), 57t
  options, fit score summary, 58t
  oversight, delegation, 34
  projects, Hype Cycle (Gartner), 53–54, 54f
  selection, weighted scorecard, 183f
  transition cycle, 55f
  usage, 16
  vendors, hosting service outsourcing, 156
Telefundraising, 159
Telephone Consumer Protection Act of 2003 (TCPA), 97, 136, 222
Text messages, usage, 97
Time, zero-sum game, 23
Time-intensive profiles, generation, 84
Training, 209
  effectiveness, fundraising executive control, 41
  efforts, evaluation, 191f
  obstacle, 65
  outcomes, gauging, 190
  process, 40–41
Transitions
  failure, 63
  roles, 52–68
  steps, 54–63
Translation skills, 200
Trends, 115, 158–160
  assessment, 209
  data component, 123
  movement, 158–160
  principles, application, 120–132
Tributes, 214
Turnaround times, quickness (importance), 21
Universal Postal Union (UPU), 29
Unrestricted giving, 103, 104–105
Video calling, 159
Virtual desktops
  access, 129
  usage, 128
Virtualization, 127–132
  team/mobility, relationship, 129–130
Virtual mobility, constituents (mobility), 128–129
Virtual private network (VPN), 222
  usage, 129–130
Volume
  defining, 206f
  imaging, alignment, 141–142
Volunteer, 219
Wealth-screening process, data availability/privacy differences, 69
Web applications, 127–132
Web-based resources, usage, 11
Whelan, Don, 167–169
Widow group, 87
Work, amount (completion), 24
Year, 219
Zoilo, John, 170–171