Raising the Bar with Connect-FR

2014 DDI User Group Meeting
April 22-23, 2014

DDI™

Serving those who serve others

AICPA Service Organization Control Reports
AICPA SERVICE ORGANIZATIONS
SOC
aicpa.org/soc
Formerly SAS 70 Reports

N-TEN MEMBER

Show of Hands:

Who believes fundraising is always evolving?

Share:

What changes are you seeing in your major Donors?

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Top Ten Trends for Major Donors

- Donors are wary of trusting us.
- The Boomers are becoming the #1 donor population.
- Older ladies are THE major donor demographic.
- Donors want Donor-Centered communications.
- Major donors who volunteer give more. Much more.

Top Ten Trends for Major Donors

- Major donors are all over social media.
- Major donors look at their gifts as investments. They want to see impact and ROI.
- Major donors are assured when they see the financials and the numbers.
- Like most of us, donors are feeling overwhelmed, jaded, and even bored.
- Major donors love a Big Idea.

Fired UP Fundraising, http://www.gailperry.com/2013/04/top-10-trends-how-major-donors-are-changing-and-what-to-do-about-it/

Share:

Have you seen any of these trends? Agree/Disagree?

Share:

What are some trends you are seeing in the industry?

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5 Key Fundraising Trends from 2013

- Overall charitable giving grew 4.9% in 2013, while online giving grew 13.5%.
- Online giving accounted for 6.4% of all charitable giving in 2013.
- Large organizations had the greatest increase in overall charitable giving in 2013, while small organizations had the greatest increase in online giving during 2013.

5 Key Fundraising Trends from 2013

- International affairs organizations had the greatest increase in overall charitable giving in 2013, while faith-based organizations had the greatest increase in online giving in 2013.

- More than one-third (33.6%) of overall charitable giving happens in the last three months of the year, with the highest percentage (17.5%) coming in December.

Share:

Have you seen any of these trends? Agree/Disagree?

DDI-Connect Can Help!

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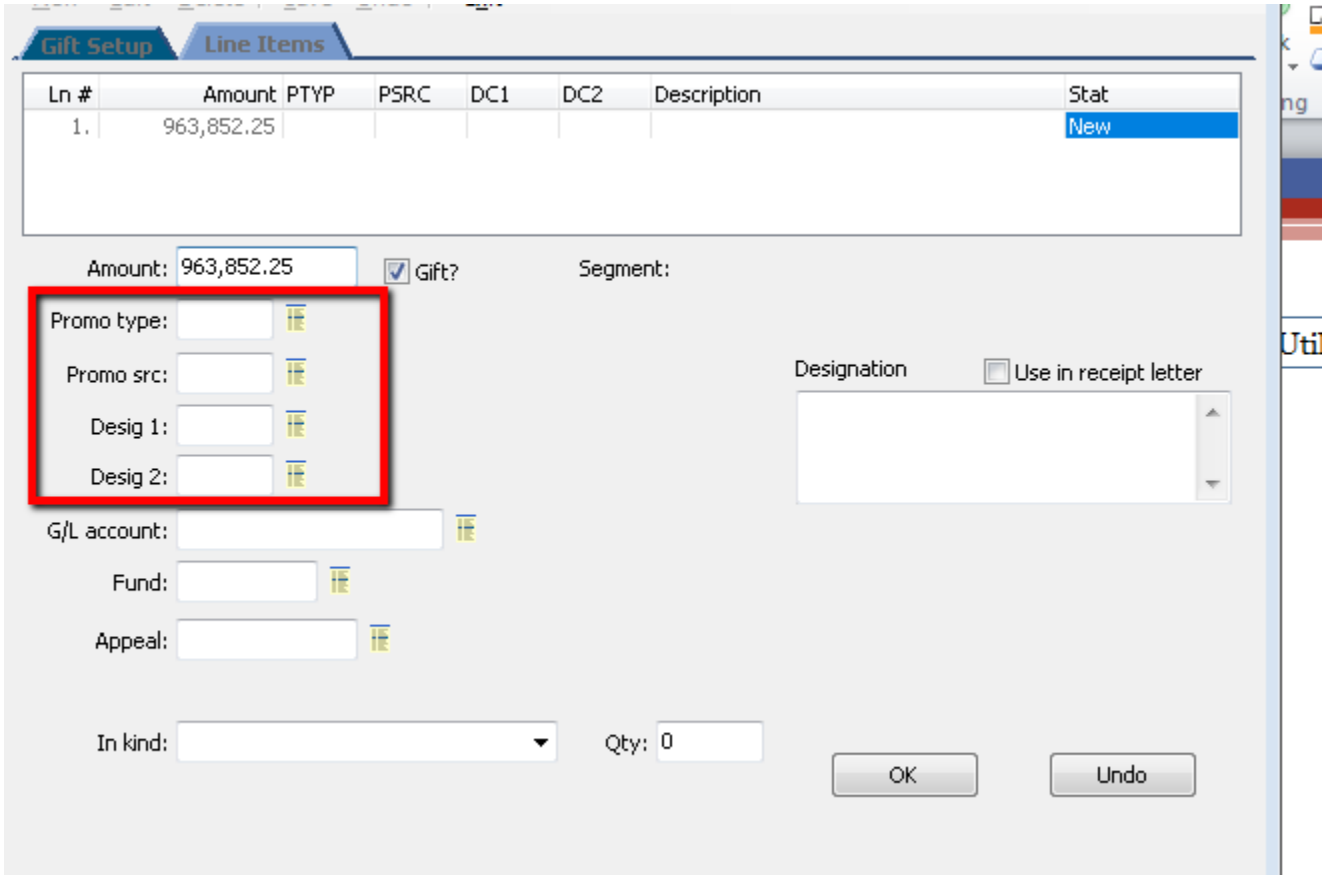
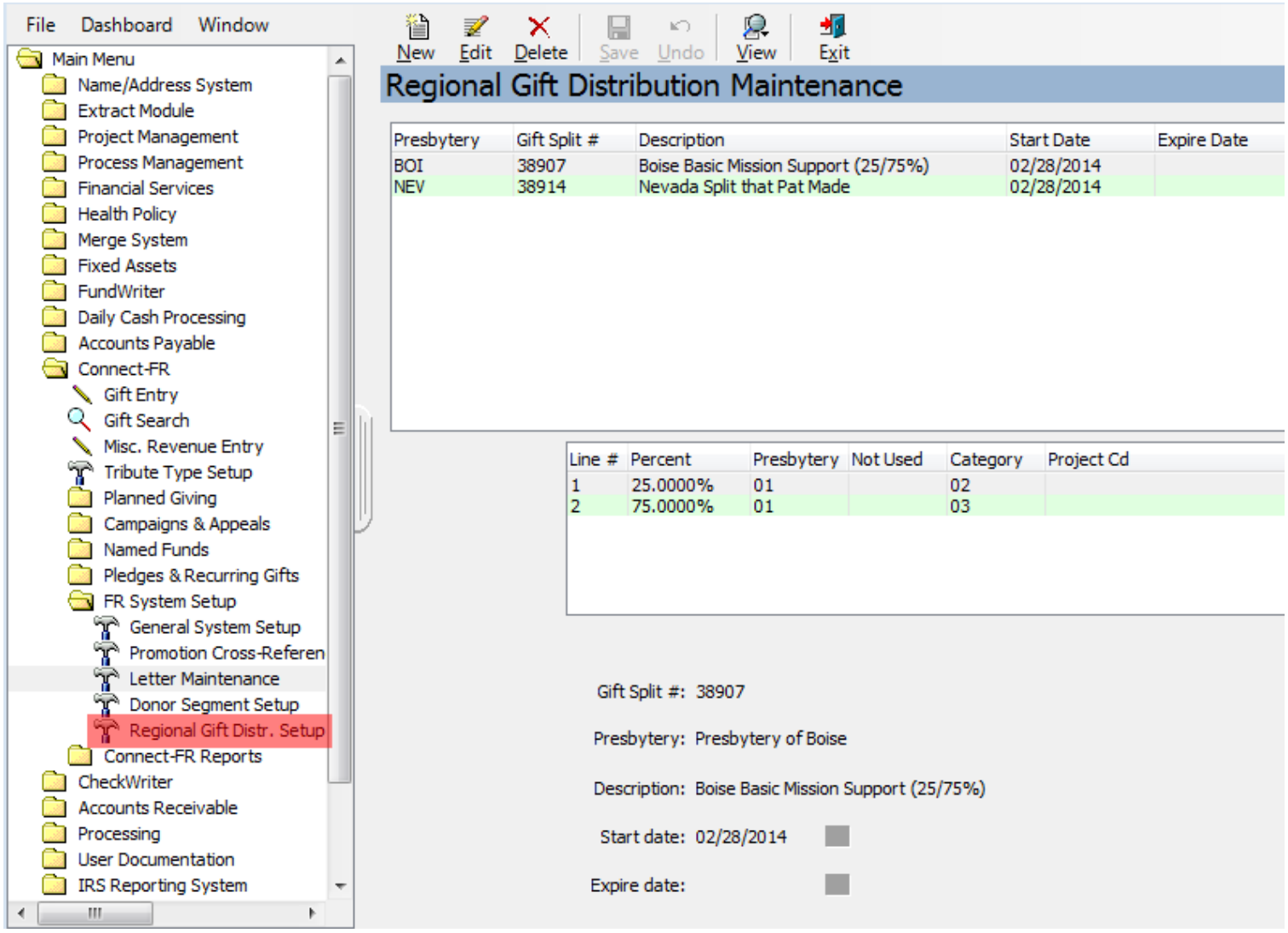
Track Your Gifts Better



Utilize the Gift Tracking Fields to their fullest!

- ✓ Promo Type
- ✓ Promo Src
- ✓ Desig 1
- ✓ Desig 2

Automate Your Gift Splits – Coming June of 2014!



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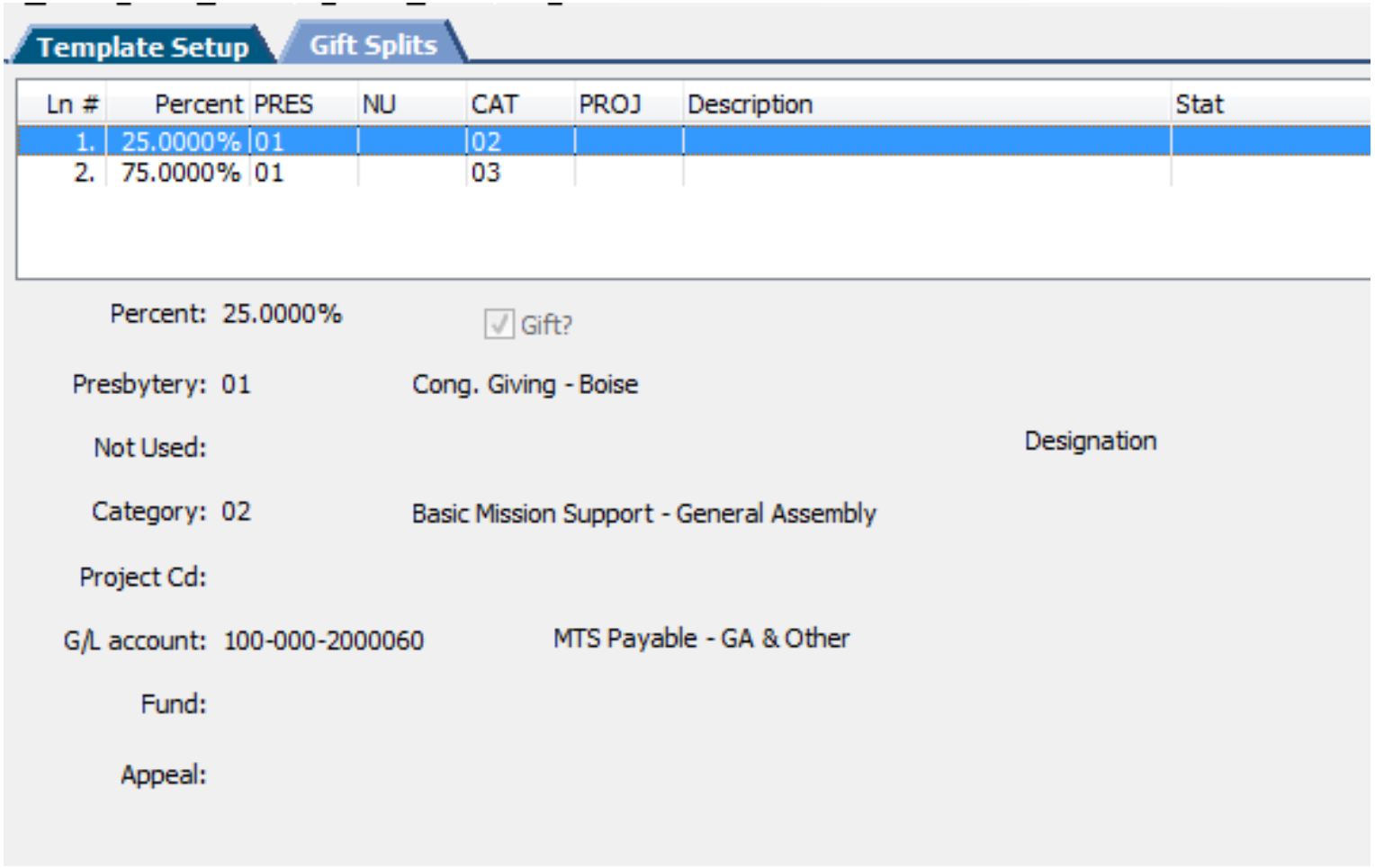
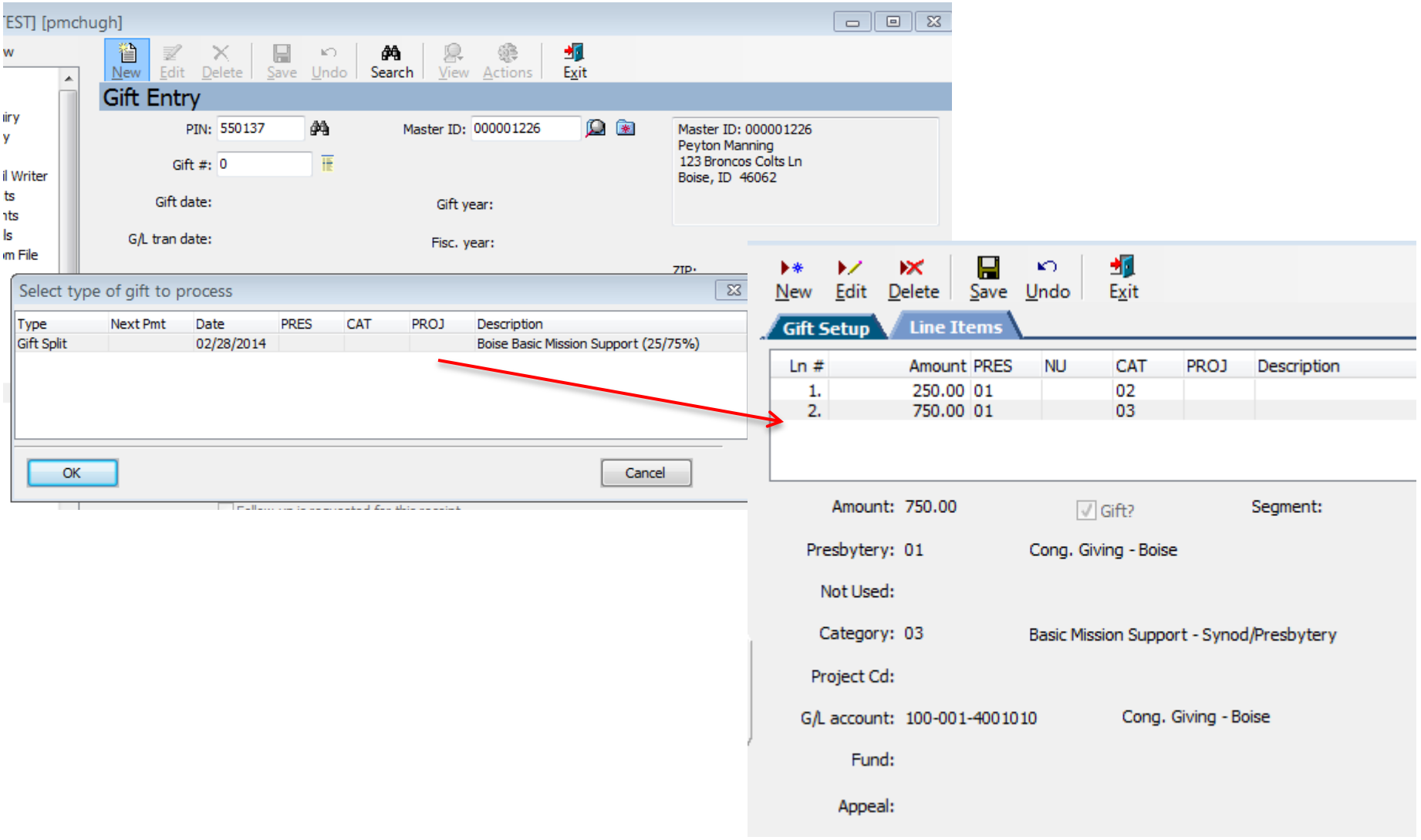
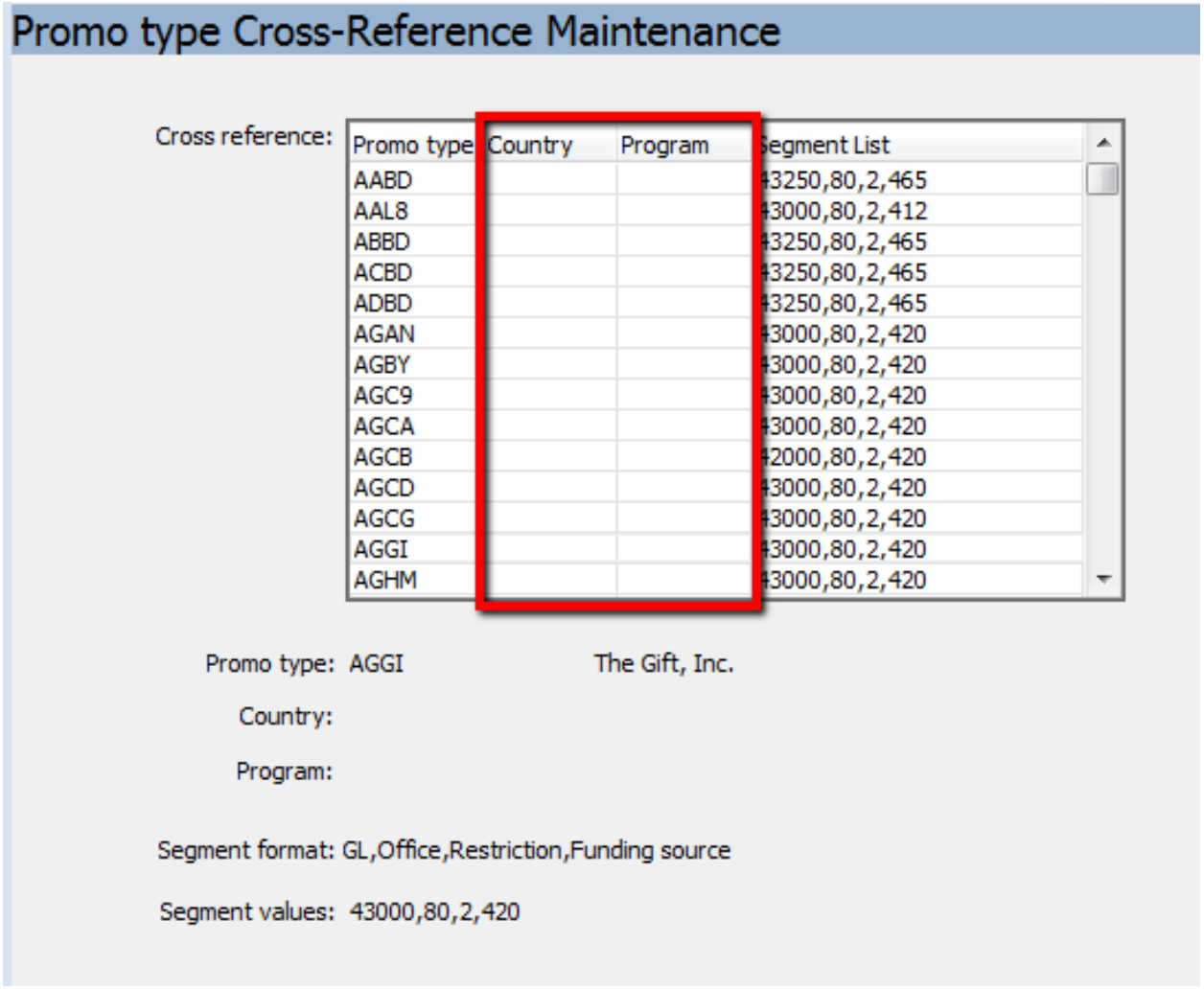
Automate Your Gift Splits – Coming June of 2014!



Automate Your Gift Splits – Coming June of 2014!

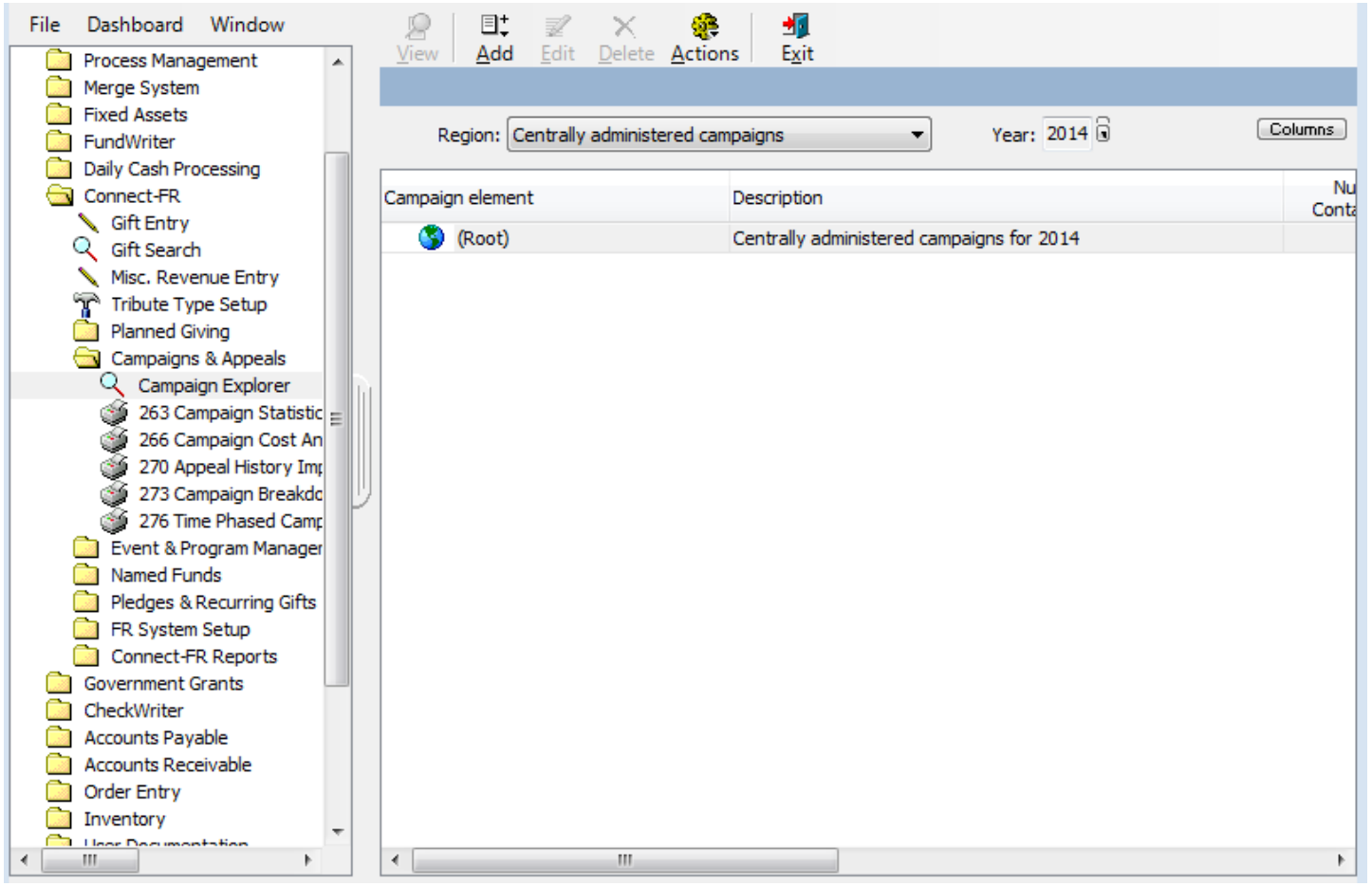


Streamline Data Entry – Coming June of 2014!



- ✓ Automate GL assignment more precise.
- ✓ Cut Down on Data Entry Error.

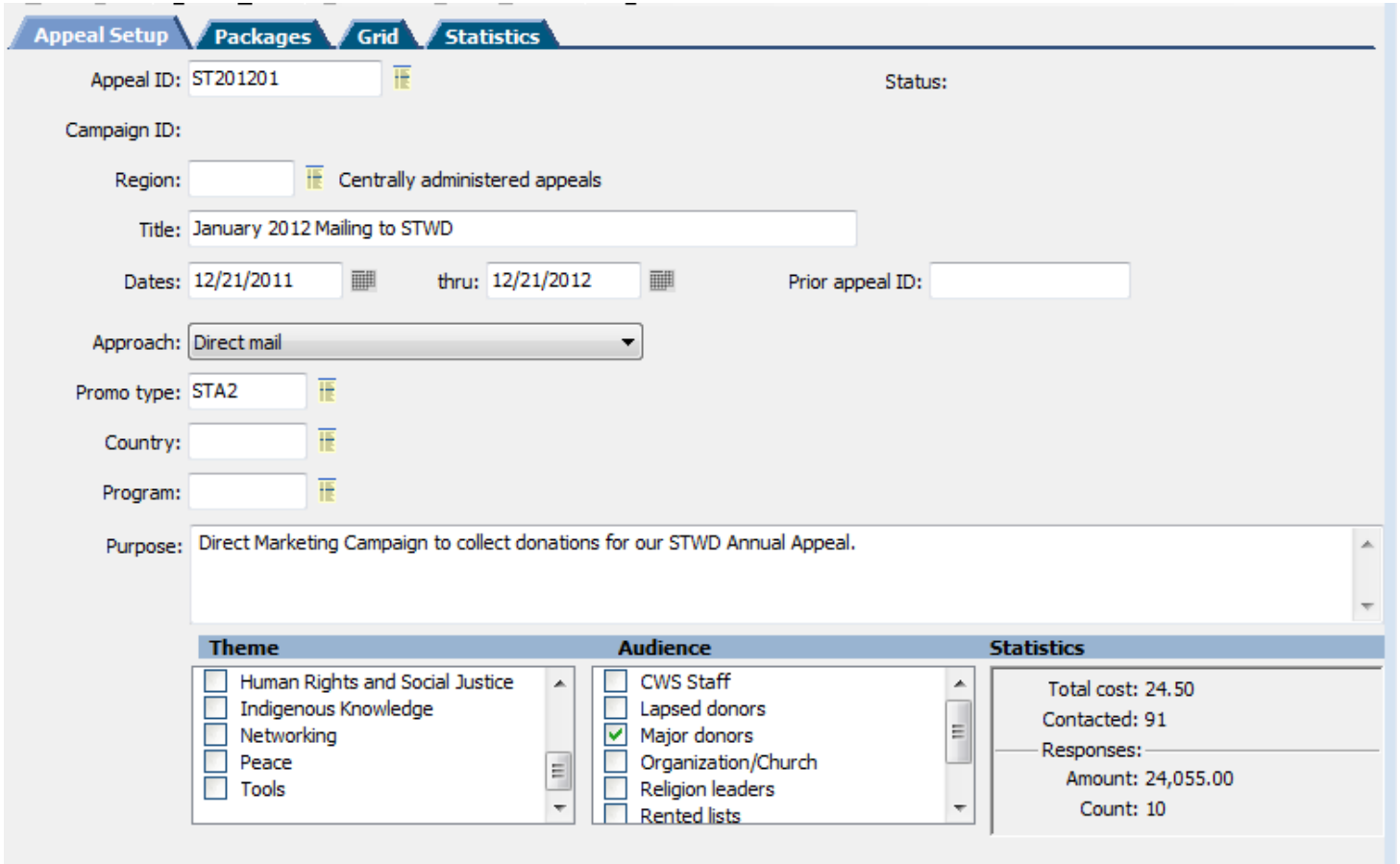
Campaigns and Appeals



Use campaigns and appeals to track cost/effectiveness of your fundraising effort.

Campaigns and Appeals

Appeal Setup



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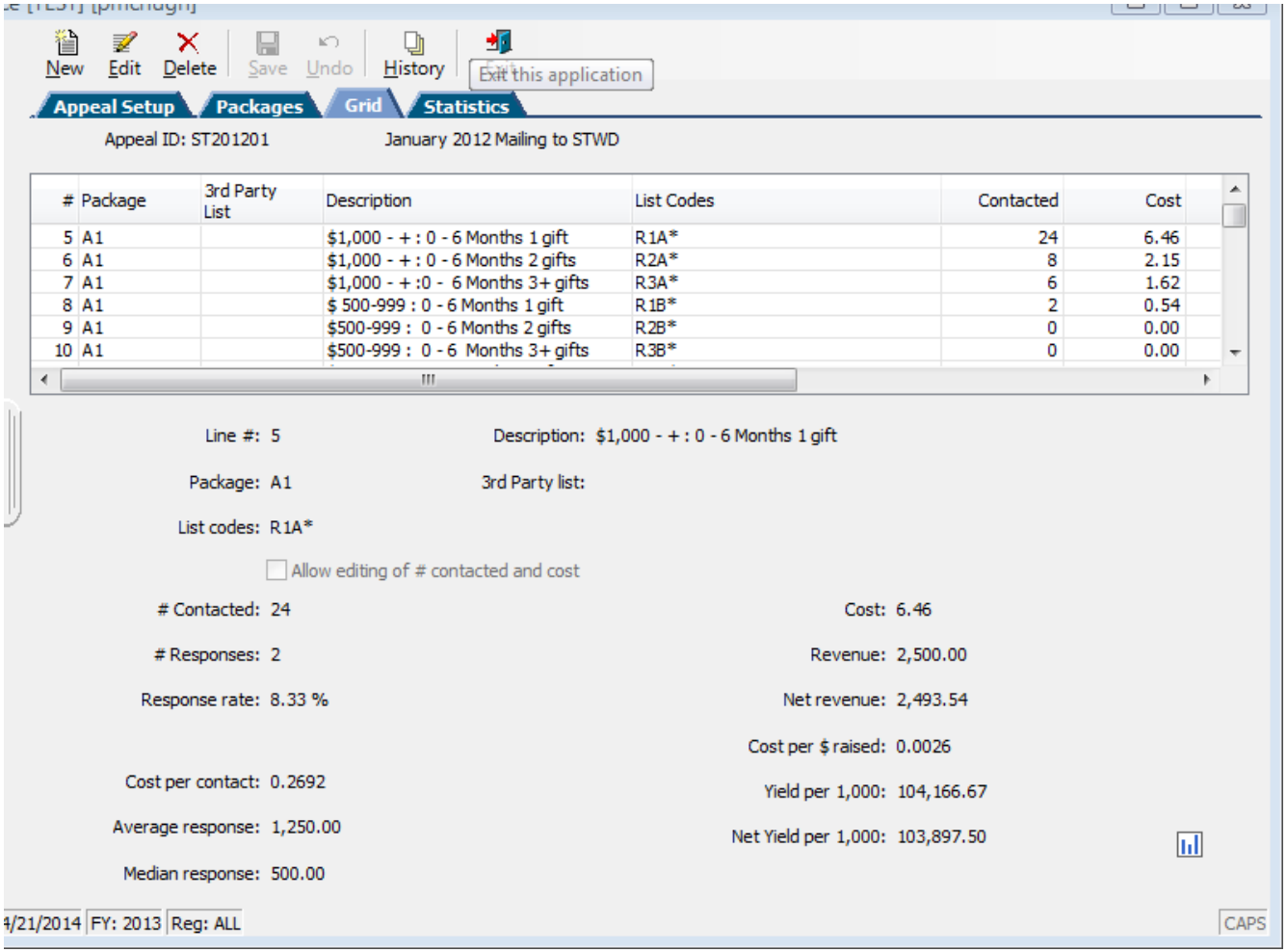
Campaigns and Appeals

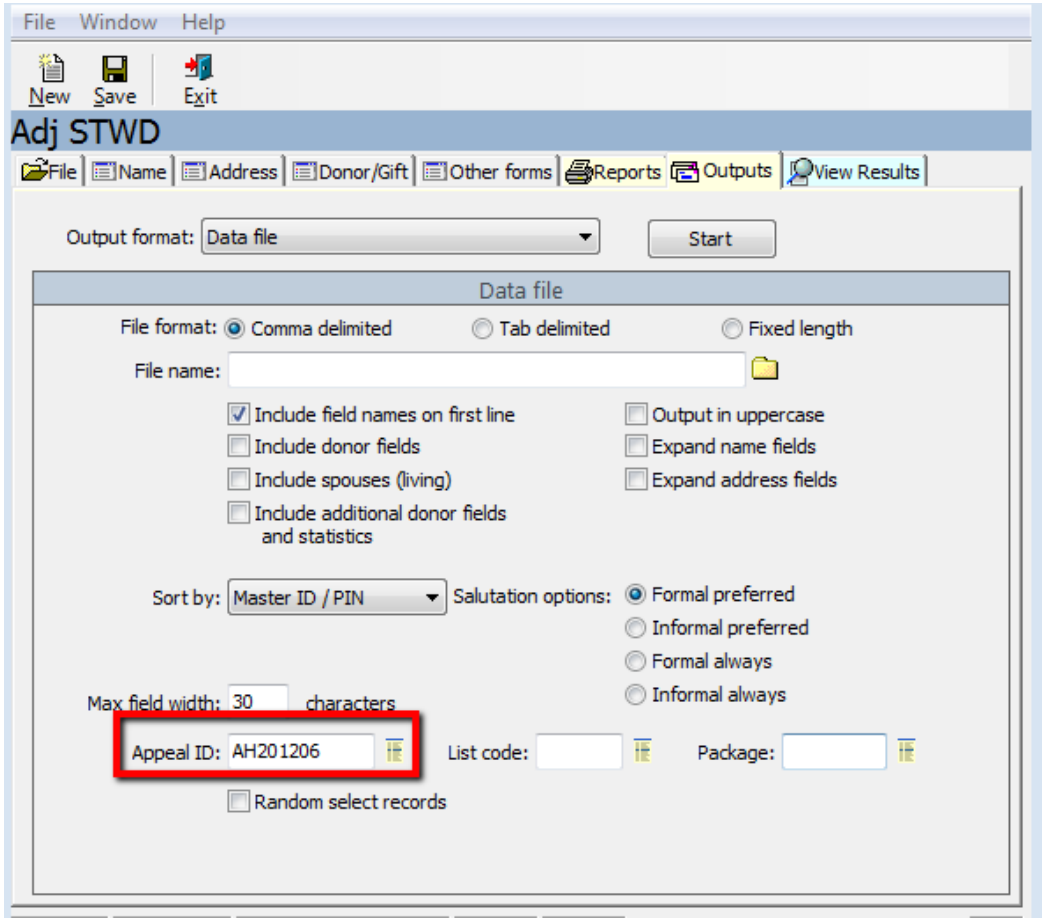
Appeal Grid



Campaigns and Appeals

Appeal Grid Updates

- Extracts



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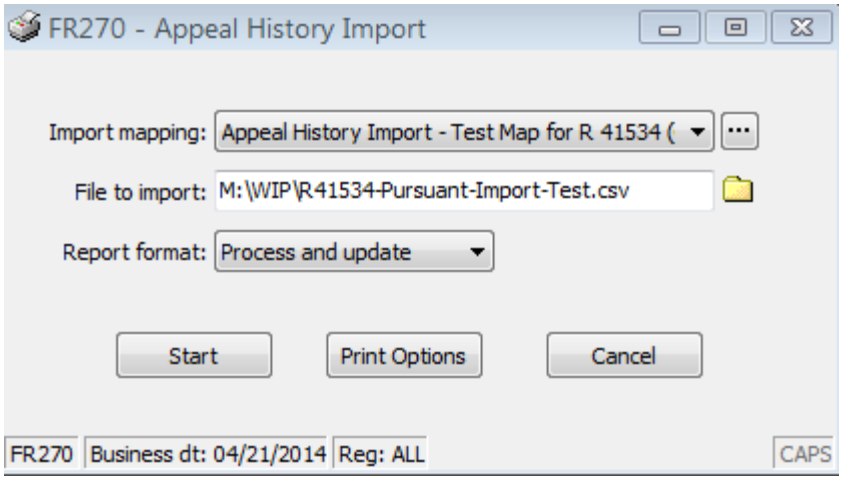
Campaigns and Appeals

Appeal Grid Updates

- FR270 – Appeal History Import



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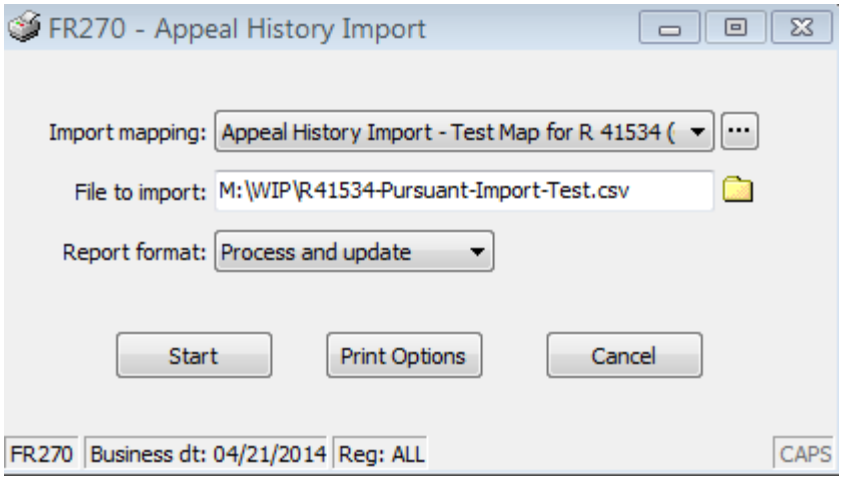
Campaigns and Appeals

Appeal Grid Updates

- FR270 – Appeal History Import



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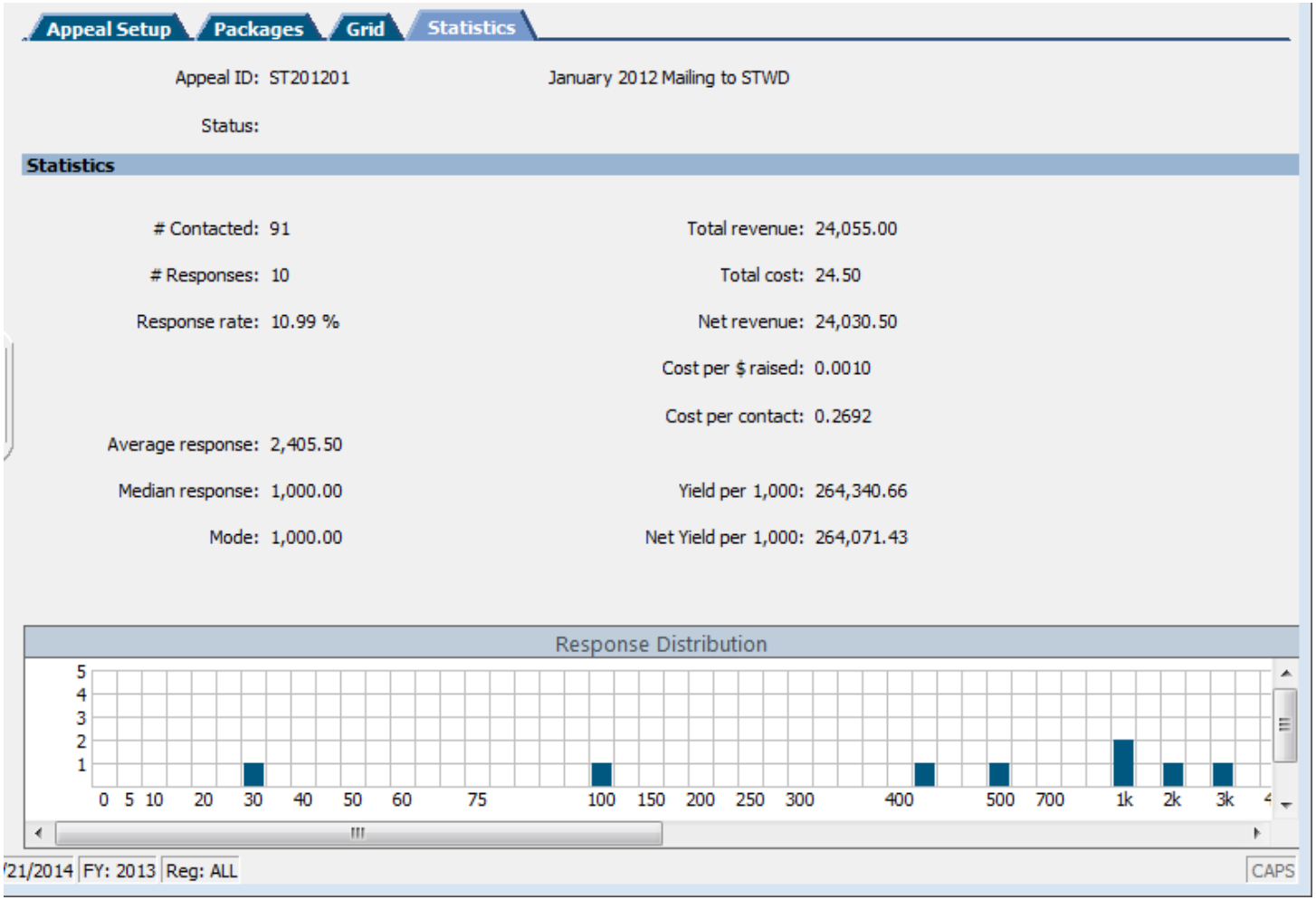
Campaigns and Appeals

Appeal Statistics



Campaigns and Appeals

Campaign Reports

- FR263 – Campaign Statistics

DDI Demo for Fund Raising
07/11/2012 9:47:31 AM EDT
FR263

Campaign Statistics Report

Page 49

Campaigns for 2012 -- All packages combined

Sgmt	Description	Total Returns	Total Sent	% Return	Total Revenue	Cost	Net Revenue	Average Gift	Median Gift	% Largest Gift	% First Gift	Activ. Ratio	Renew. Ratio	Avg. # Gifts/Yr	% Mult. Gifts/Yr	Cost/% Raised	Yield/K	Net Yield/K	Cost/Piece
H3GH	Rec. gift: 0-9	1	34	2.94%	2	0	2	2	2	0.00%	0.00%	0.00%	100.00%	0	0.00%	0.00	59	59	0.00
	Lrg. gift: 0-9 Months : 25-36 (1+ gifts) Tot gifts: 1																		
H3HH	Rec. gift: 0-9	3	413	0.73%	18	0	18	6	5	0.00%	0.00%	0.00%	100.00%	0	0.00%	0.00	44	44	0.00
	Other Sources (Blank segment code)	1	1	100.00%	50	0	50	50	50	0.00%	0.00%	0.00%	0.00%	0	0.00%	0.00	50,000	50,000	0.00
	TOTAL	1,400	39,008	3.59%	184,603	0	184,603	132	90	0.00%	0.00%	0.00%	100.00%	0	1.58%	0.00	4,732	4,732	0.00

- FR266 – Cost Analysis

07/11/2012 10:51 AM EDT
FR266

DDI Demo for Fund Raising
Campaign Cost Analysis
01/01/2012 thru 04/02/2012

Page 1

Appeals: STEST1

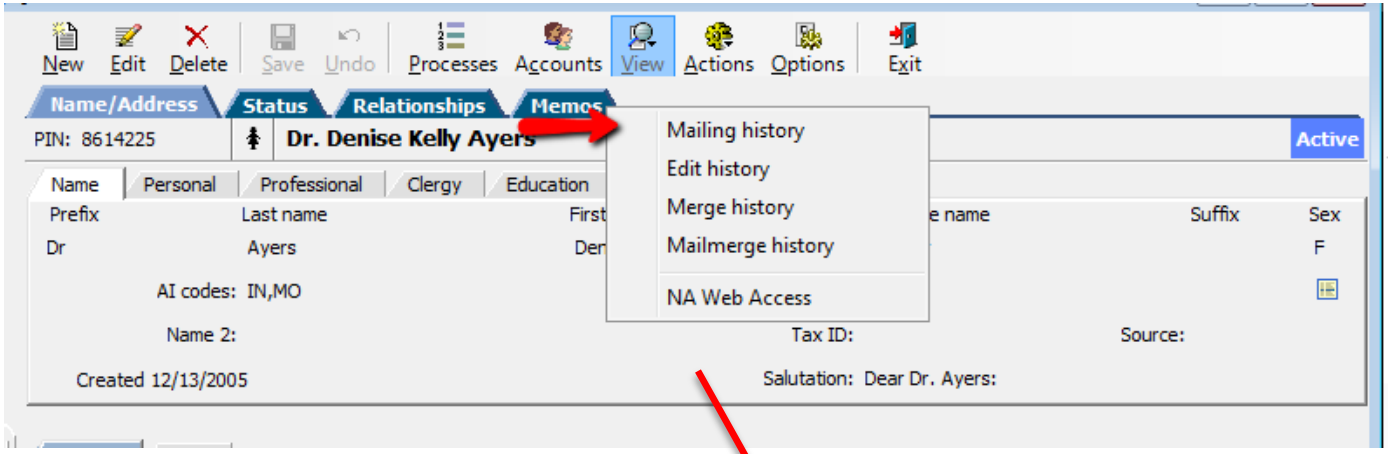
Appeal	Description	Pieces Sent	Pieces Return	Return Pct	Revenue	Cost	Net Revenue	Revenue Per Piece Return	Cost Per Piece Sent	Revenue Per Thousand	Net Revenue Per Thousand
STEST1	Sheila is testing	500	3	0.60%	6,550.00	4,325.96	2,224.04	2,183.33	8.65	13,100.00	4,448.08
	TOTAL	500	3	0.60%	6,550.00	4,325.96	2,224.04	2,183.33	8.65	13,100.00	4,448.08

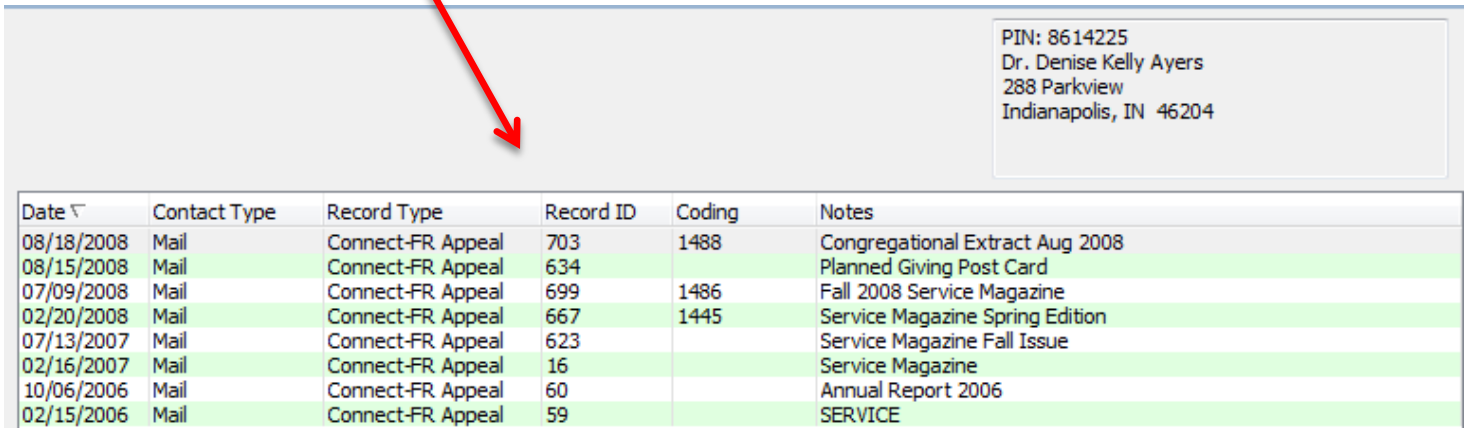
***** END OF REPORT *****

Campaigns and Appeals

Name/Address

- Appeal Mailing History





PIN: 8614225
Dr. Denise Kelly Ayers
288 Parkview
Indianapolis, IN 46204

Date	Contact Type	Record Type	Record ID	Coding	Notes
08/18/2008	Mail	Connect-FR Appeal	703	1488	Congregational Extract Aug 2008
08/15/2008	Mail	Connect-FR Appeal	634		Planned Giving Post Card
07/09/2008	Mail	Connect-FR Appeal	699	1486	Fall 2008 Service Magazine
02/20/2008	Mail	Connect-FR Appeal	667	1445	Service Magazine Spring Edition
07/13/2007	Mail	Connect-FR Appeal	623		Service Magazine Fall Issue
02/16/2007	Mail	Connect-FR Appeal	16		Service Magazine
10/06/2006	Mail	Connect-FR Appeal	60		Annual Report 2006
02/15/2006	Mail	Connect-FR Appeal	59		SERVICE

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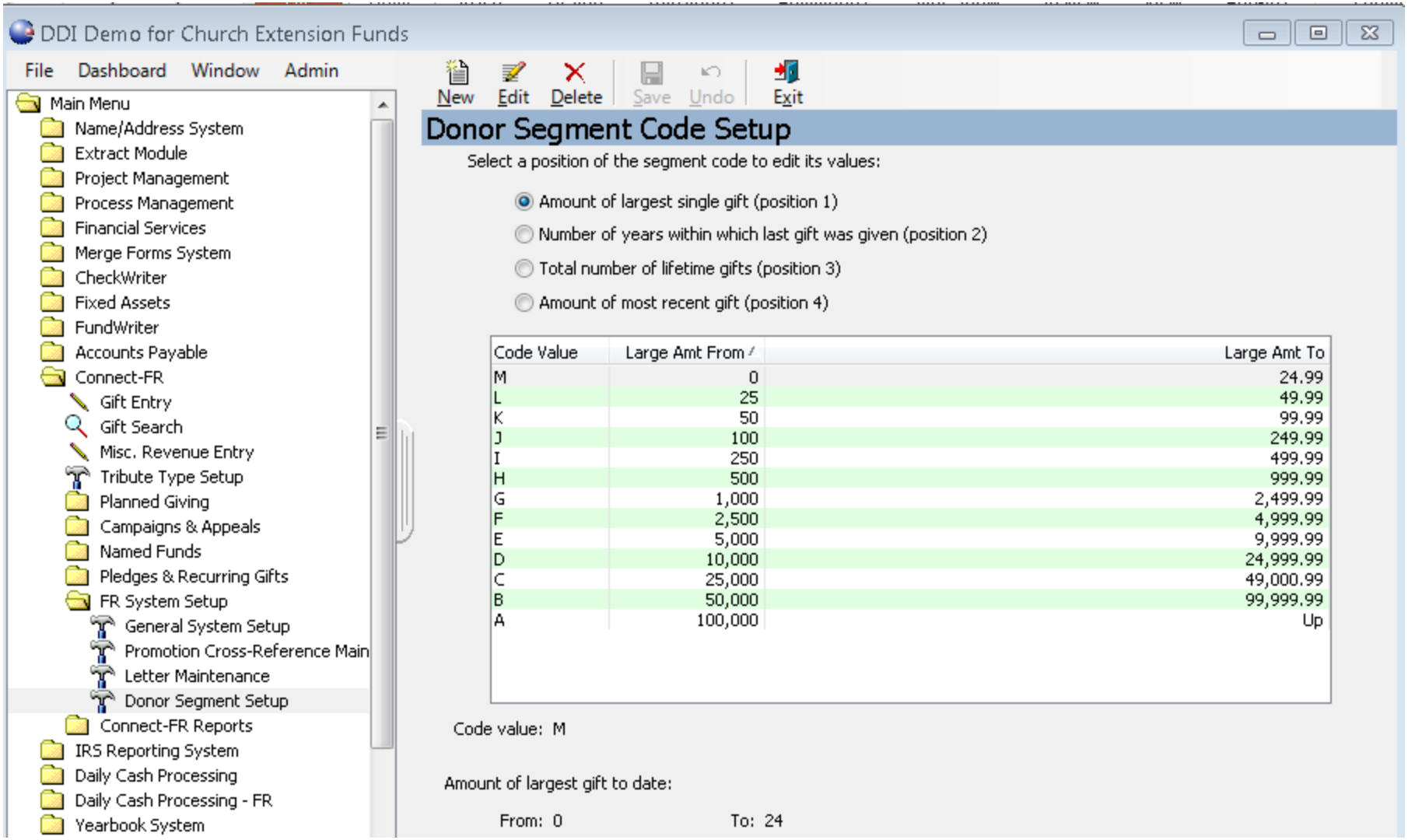
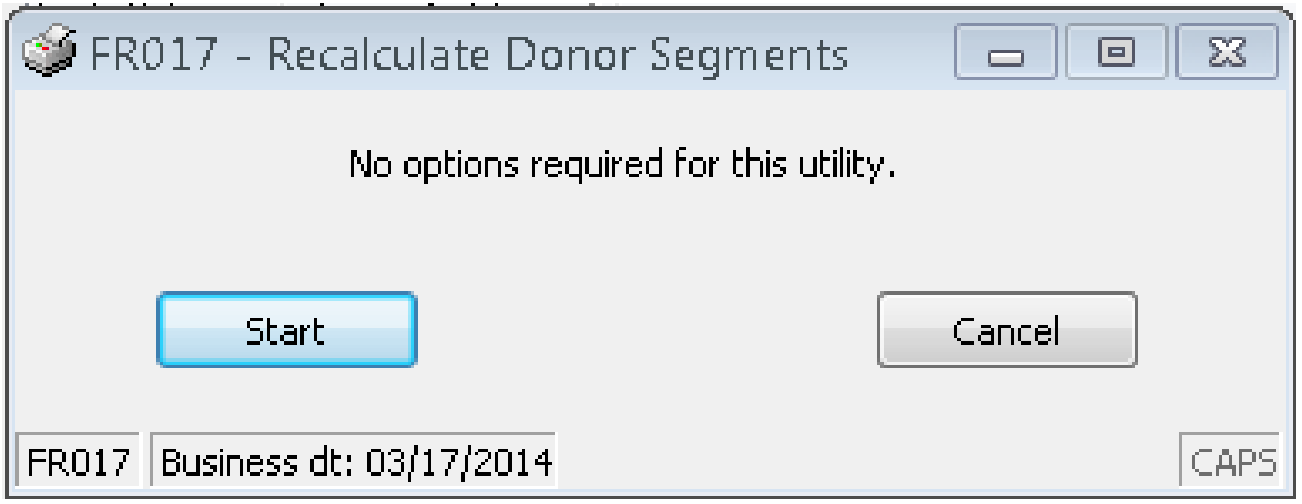
Donor Segment Review



Donor Segment Review



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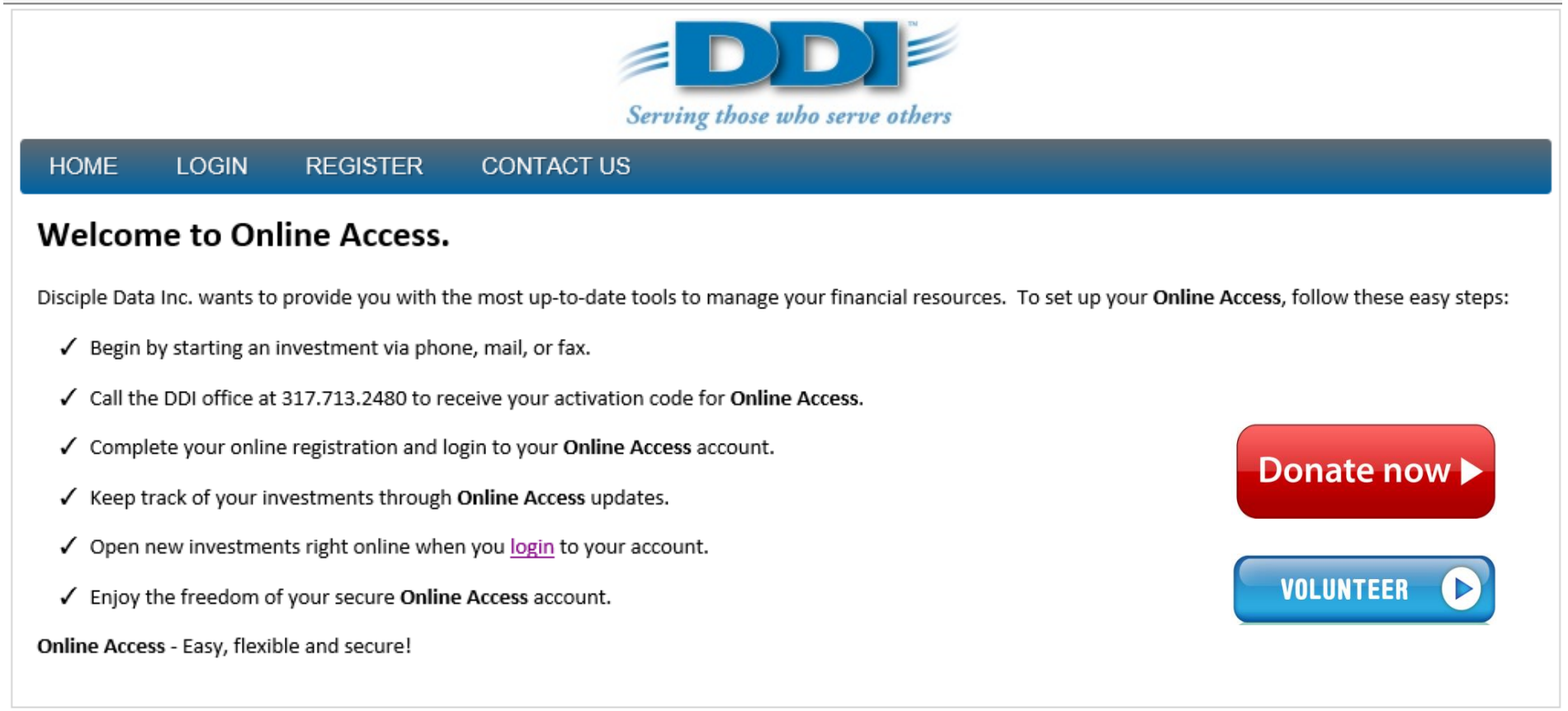
Online Giving Accounts



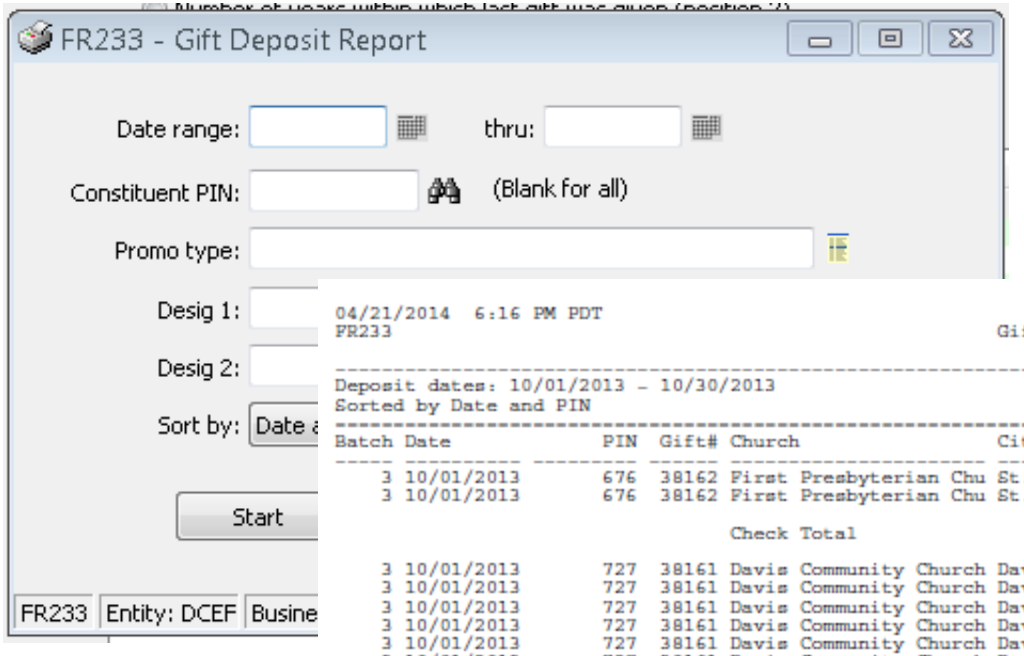
Online Giving Accounts

Online Giving Accounts – Electronic Receipts/Statements

Account Statements for 2014

Document Number	Statement Date	Description	Account Number	For
34900	01/28/2014	1099 Stmts: 2013 Taxable Year	000010070	Account 000010070
35986	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 3003
35987	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 1008
34423	01/21/2014	Loan Pmt Rcpt 01/21/2014	000010123	Loan 3003
34581	01/28/2014	1099 Stmts: 2013 Taxable Year	000010123	Account 000010123
31202	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,1008
31244	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,3003
32983	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 3003
32984	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 1008
35678	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,1008
35720	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,3003
37184	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,1008
37226	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,3003
37415	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 1008
37416	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 3003
42534	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 1008
42535	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 3003
42989	04/11/2014	Loan Pmt Rcpt 04/11/2014	000010123	Loan 3003
43255	04/16/2014	Loan Pmt Rcpt 04/16/2014	000010123	Loan 3003

Gift Deposit Report - New (FR233)



04/21/2014 6:16 PM PDT Page 1
FR233 Gift Deposit Report

Deposit dates: 10/01/2013 - 10/30/2013
Sorted by Date and PIN

Batch	Date	PIN	Gift#	Church	City	Amount	Check	CAT	Project
3	10/01/2013	676	38162	First Presbyterian Chu	St. Helena	145.83	7956	02	
3	10/01/2013	676	38162	First Presbyterian Chu	St. Helena	437.50	7956	03	
				Check Total		583.33			
3	10/01/2013	727	38161	Davis Community Church	Davis	729.17	20044	02	
3	10/01/2013	727	38161	Davis Community Church	Davis	2,187.50	20044	03	
3	10/01/2013	727	38161	Davis Community Church	Davis	250.00	20044	05	507025 Reeder, Jonna - Tajik
3	10/01/2013	727	38161	Davis Community Church	Davis	23.00	20044	12	6200000 PEACEMAKING RECEIPTS
3	10/01/2013	727	38161	Davis Community Church	Davis	11.50	20044	12	6104240 Sacramento Peacemaki
3	10/01/2013	727	38161	Davis Community Church	Davis	417.00	20044	21	900000 PENTECOST OFFERING -
3	10/01/2013	727	38157	Davis Community Church	Davis	250.00	20031	22	757280 Sacr/Small Church Ass
				Check Total		3,868.17			
3	10/01/2013	1385	38158	First Presbyterian Chu	Idaho Falls	421.88	15603	02	
3	10/01/2013	1385	38158	First Presbyterian Chu	Idaho Falls	1,265.62	15603	03	
				Check Total		1,687.50			
3	10/01/2013	4449	38160	Stone Church of Willow	San Jose	1,290.00	25208	02	
3	10/01/2013	4449	38160	Stone Church of Willow	San Jose	5,160.00	25208	03	
				Check Total		6,450.00			
3	10/01/2013	7044	38165	Pioneer Presbyterian C	Burns	105.95	4890	02	
3	10/01/2013	7044	38165	Pioneer Presbyterian C	Burns	317.88	4890	03	
				Check Total		423.83			

DDI Next Generation Discussion

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Discussion, Questions, Comments

Patrick McHugh
pmchugh@ddi.org
317.713.2472

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