

# What's a Database Manager, Anyway?

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Ryan Hyde – Lollypop Farm

Sunshine Watson – Valleywise Health Foundation

Stephanie Crawley – Archdiocese of San Antonio

bbcon<sup>®</sup> 2020  
VIRTUAL



## Ryan Hyde

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Manager of Database Analytics

Lollypop Farm

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## Sunshine Watson

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Donor Database Manager

Valleywise Health Foundation

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## Stephanie Crawley

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Database Consultant

Archdiocese of San Antonio

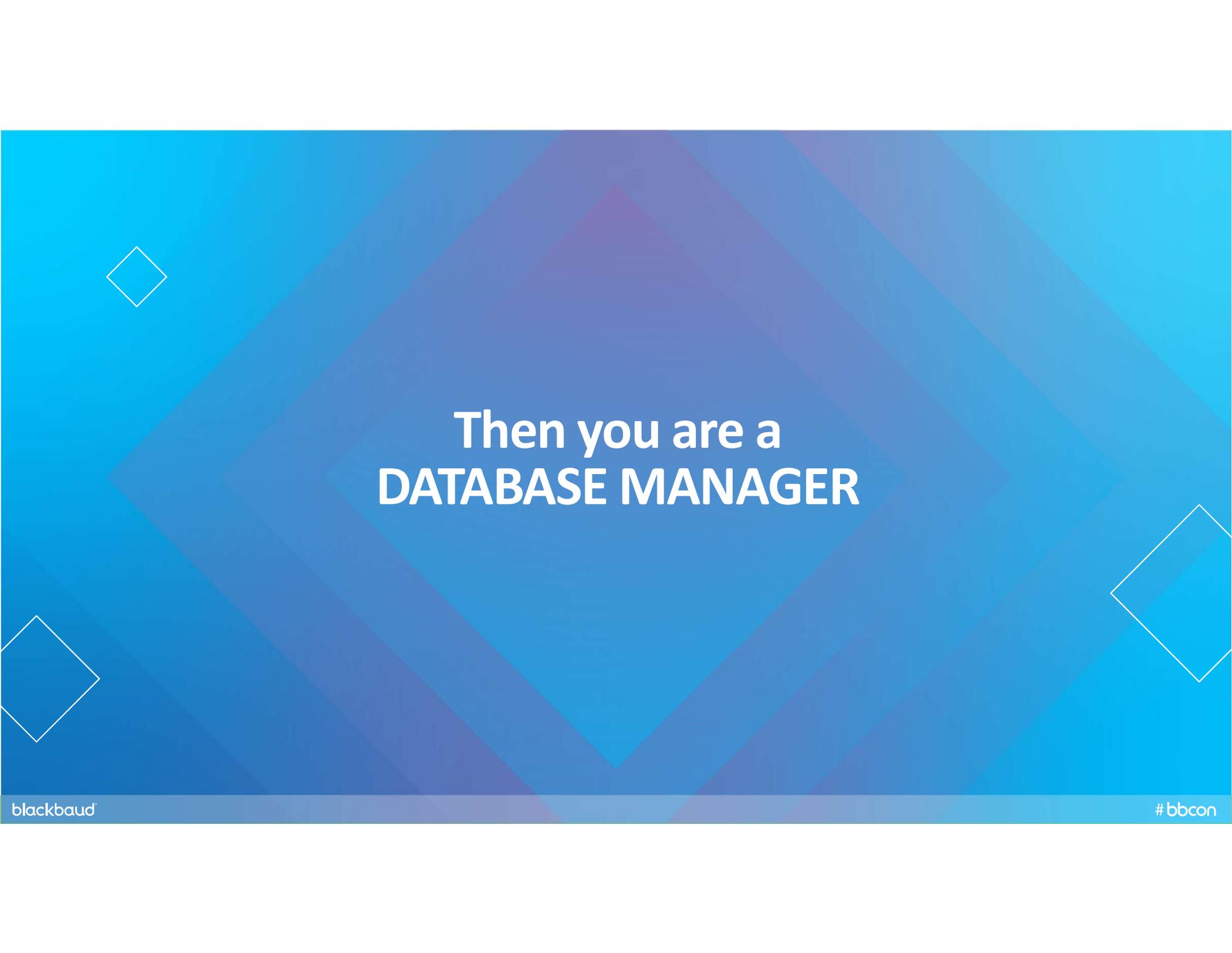
[linkedin.com/in/Stephanie-crawley-bcre-pro](https://www.linkedin.com/in/Stephanie-crawley-bcre-pro)

*The content set forth in the following presentation reflects the views and opinions of the presenter and not those of Blackbaud, Inc.*



## Are you the one who... ?

- Writes most of the queries?
- Creates most of the reports?
- Decides HOW data is going to be formatted and retained?
- Comes up with the structure of your data?
- Maintains the cleanliness of your data?
- Manages business rules?
- Knows how to do an import?
- ~~Helped everyone get set up to work remotely this year?~~



Then you are a  
**DATABASE MANAGER**

**But your job is more than just a  
list of technical skills**

# A Database Manager is a Team Player

Sunshine Watson



**Invisible team member?  
Not you. That's the database**





# A Database Manager is a Team Player

- Listen to your team
- Involve the team
- Play nice

# Listen to the needs of your team

- Find ways to be in the loop
- Be in the meetings
- Contribute and inspire
- Use what you learn





## Involve the team

- ✓ Training
- ✓ Collaboration
- ✓ Set everyone up for success

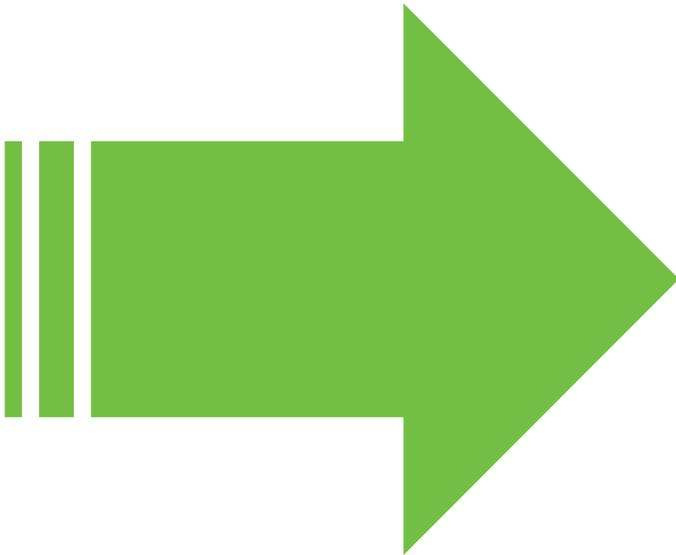


✓ Training



# BLACKBAUD UNIVERSITY

Train the users at your organization for one single price. Our three **Learn**® subscription tiers provide all the necessary technology training for any budget and need. Pricing is based on the software solution owned by the organization.



	LEARN BASICS	LEARN MORE	★ LEARN EVERYTHING
<b>Product</b>	<ul style="list-style-type: none"><li>✓ eLearning</li></ul>	<ul style="list-style-type: none"><li>✓ eLearning</li></ul>	<ul style="list-style-type: none"><li>✓ eLearning</li></ul>
<b>Organizational Best Practices</b>	<ul style="list-style-type: none"><li>✓ eLearning</li></ul>	<ul style="list-style-type: none"><li>✓ Virtual Instructor-Led Training</li><li>✓ Certifications</li></ul>	<ul style="list-style-type: none"><li>✓ Virtual Instructor-Led Training</li><li>✓ Certifications</li><li>✓ Public Classroom Training for Product</li></ul>
<b>NEW IN 2019</b>		<ul style="list-style-type: none"><li>✓ eLearning</li><li>✓ Virtual Instructor-Led Workshops</li><li>✓ Certifications</li></ul>	<ul style="list-style-type: none"><li>✓ eLearning</li><li>✓ Virtual Instructor-Led Workshops</li><li>✓ Certifications</li><li>✓ Public Classroom Training for Best Practices Workshops</li></ul>

Course availability subject to organization's Blackbaud product and **Learn**® training subscription



Raiser's Edge NXT™  
Start Learning Today



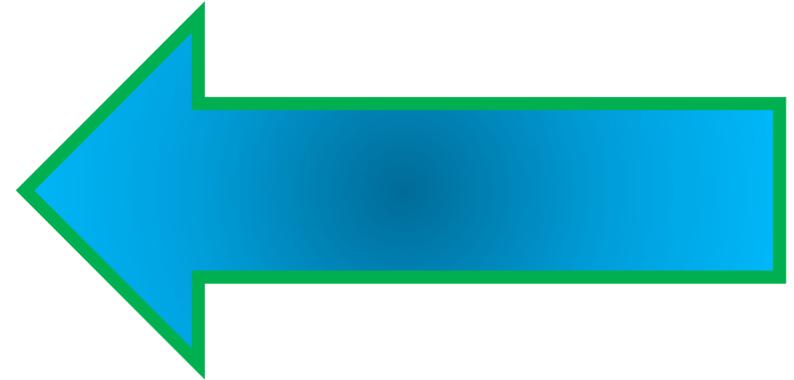
Basic eLearning

All Raiser's Edge NXT customers have access to the *Learn Basics*® on-demand eLearning:

**Raiser's Edge NXT: Basics of Raiser's Edge NXT and Constituents**

**Raiser's Edge NXT: Basics of Fundraising and Email**

View additional *Basics eLearning*...



## Training Details



**Raiser's Edge NXT: Basics of Raiser's Edge NXT and Constituents**

Online Class • Blackbaud • 1 hour • \$0.00

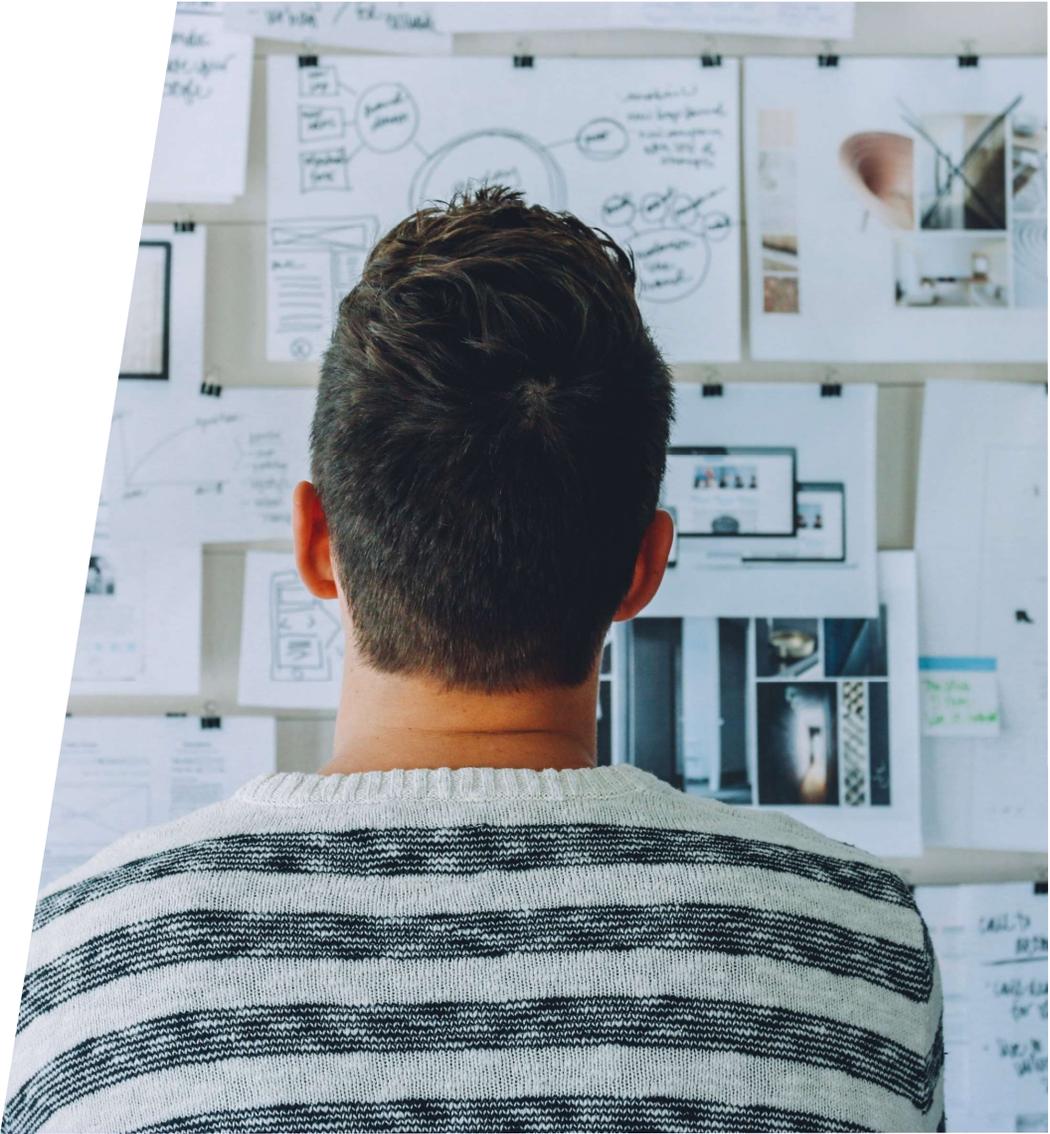
★★★★★ (127)

Launch



## ✓ Collaboration

- Plan together
- Follow-up



- ✓ **Set everyone up for success**





## ***Tip: Data Request Forms***

- Actually what I wanted was.....
  - Answer all the questions before doing the work
- How did we do this last time???
  - History for repeated requests

# Data request form examples in the community

## Blackbaud Community

my community products best practices conferences members jobs

# Organizational Best Practices

START A DISCUSSION ▾

Home Discussions Just for Fun Blog Resources Events Member Spotlights Blackbaud Identity

> [Best Practices](#) > [Organizational Best Practices](#) > Data Project Request Form

### Data Project Request Form

30 Replies



**Data Project Request Form**  
Posted by [Stephanie Crawley](#) on Aug 12, 2016 9:44 am

17 Liked (undo) [Quote](#) UNANSWERED

POSTS: 129  
JOINED: 08/10/15

I was in a Blackbaud Training class yesterday in Tampa on Crystal Reports, and the topic turned to how Directors ask the database admin for reports then after we deliver the report, they have substantial changes to the criteria or output, which can cause us wasted time and effort. I shared that we developed a form for use here for folks to formally request data, whether it's for a report or a mailing or event set-up or whatever. We require the person requesting the data to schedule a meeting with us so that the Data person can ask a series of questions, prompted by the answers needed for the form and get the answers as fully as possible before beginning the project. We ask the requestor to review the completed form to affirm that it is what they are asking for, and then have them write their name on the form as the person making the request, as a record that they reviewed it and agree that it

#### Files In This Topic

 **CFOCF Data Project Request Form**  
uploaded by [Stephanie Crawley](#)

 **Data Request Form - Fillable**  
uploaded by [Brinda Goswami](#)

blackbaud

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# *Clear is kind*

- Procedures and standards
- Coding and descriptions
- Gentle reminders

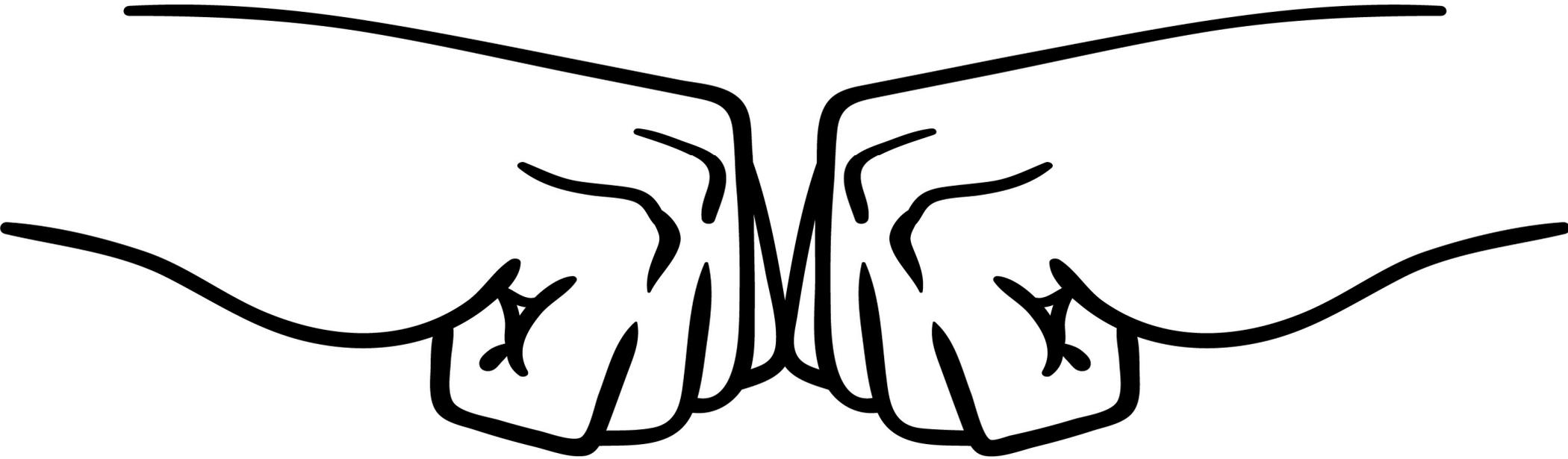


# Play nice

- ✓ Mutual respect
- ✓ Open door policy
- ✓ Be flexible
- ✓ Invested in the common vision



✓ **Mutual respect**



✓ **Open door policy**

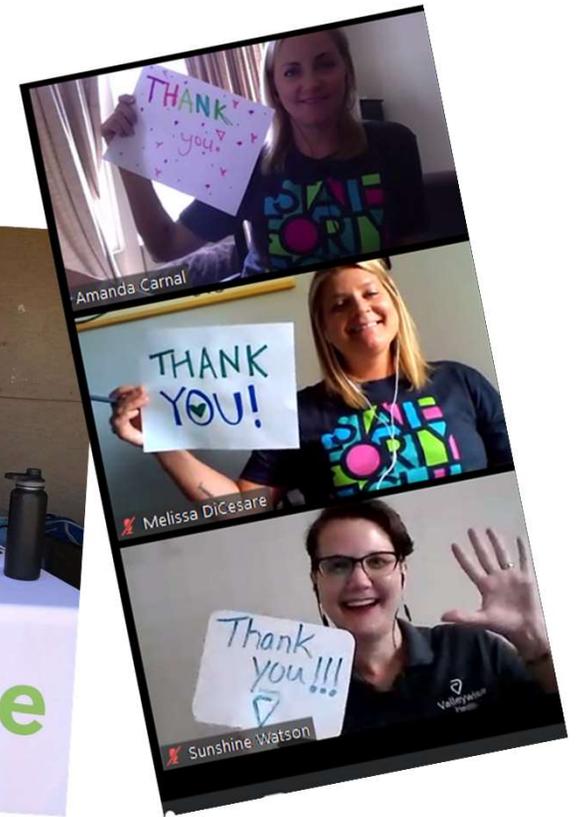


# ✓ Be flexible

Be willing to change what is not working...



✓ Be invested in the common vision and mission





# Telling the Story – It's all in the details

Stephanie Crawley







# Constituents



# Constituents

Have a relationship  
with your organization

# Constituents - Basic Data

## Individual

Name

Address

Phone Number

Email

Spouse

## Organization

Name

Address

Phone Number

Contact Email

Contact Name

# Constituents – Character Details

Name	Relationships	Gestures & Traits
First Name/Last Name	Constituency	Action
Alias	Spouse	Note
Nickname	Contact	Annotation
Maiden Name	Other Constituent	Constituent Attribute
Addressee	Non-constituent	Summary Note
Salutation	Bank	Solicit Code
		Business Rule



# Appeals are shared by Constituents and Gifts

# Ways to Record Appeals – The Ask

## At the time of Ask

In Appeals on Constituent Record

In an Action

As a Proposal on Prospect Record

## At the time of Gift

On the Gift Record

Auto-add to Constituent Record

Link Gift to Proposal

# Gifts



# Gifts

Donations or Pledges  
to your organization

# Gifts – Plot points of the Story

What

When

Why

Cash/Stock

Gift Date

Campaign

Gift-in-Kind

GL Post Date

Fund(s)

Pledge

Date Added

Appeal

Recurring Gift

Acknowledgment Date

Package

Matching Gift

Installment Schedule

Proposal

Planned Gift

Pledge Reminder  
History

Tribute

# Gifts – Plot points of the Story

How	Destination	Plot Twist
Payment Method	General Ledger	Soft Credit
Gift Subtype	GL Account Codes	Adjustment
Gift Attribute	- on Gift	Pledge Schedule Change
Gift Code	- on Fund	
Tribute	- on Restricted Fund - in Configuration	Write-off

# Events



# Events

Gatherings of constituents  
for your organization



# Events – Characters Interacting

What

Who

Footing the Bill

Sporting Event

Participants

Prices

Dinner (Gala)

Registrants

Expenses

Class

Guests

Gifts

Other

Sponsors

In-Person vs. Virtual

Volunteers

Staff

# Media



# Media

Tangible evidence of your  
relationships



# Media – Ephemera and Documentation

## Types

Photos

Letters

Contracts

News Articles

Handwritten Notes

## Where to store

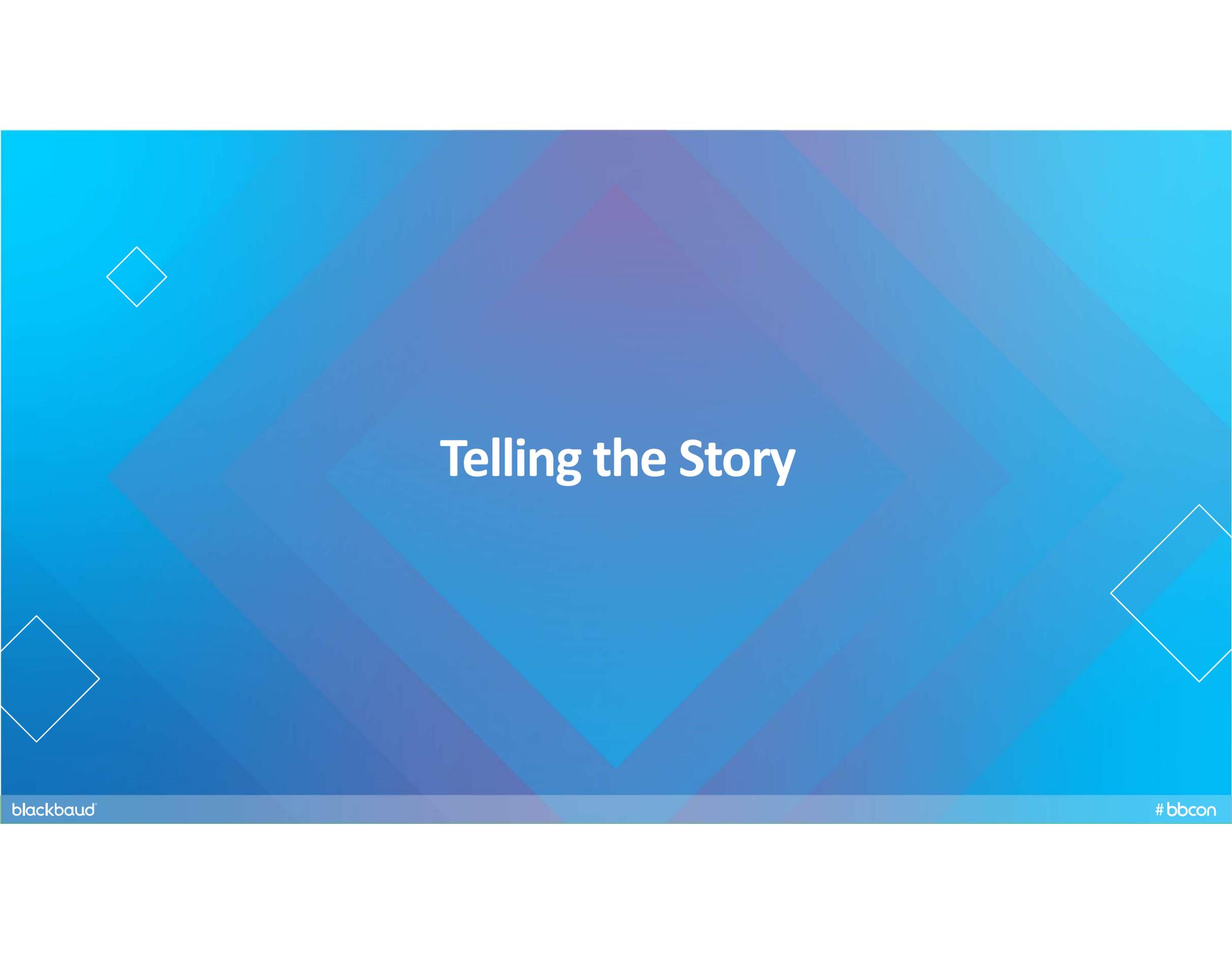
On Constituent Record

On Gift Record

On Event Record

On Proposal

As Constituent Profile Photo



# Telling the Story



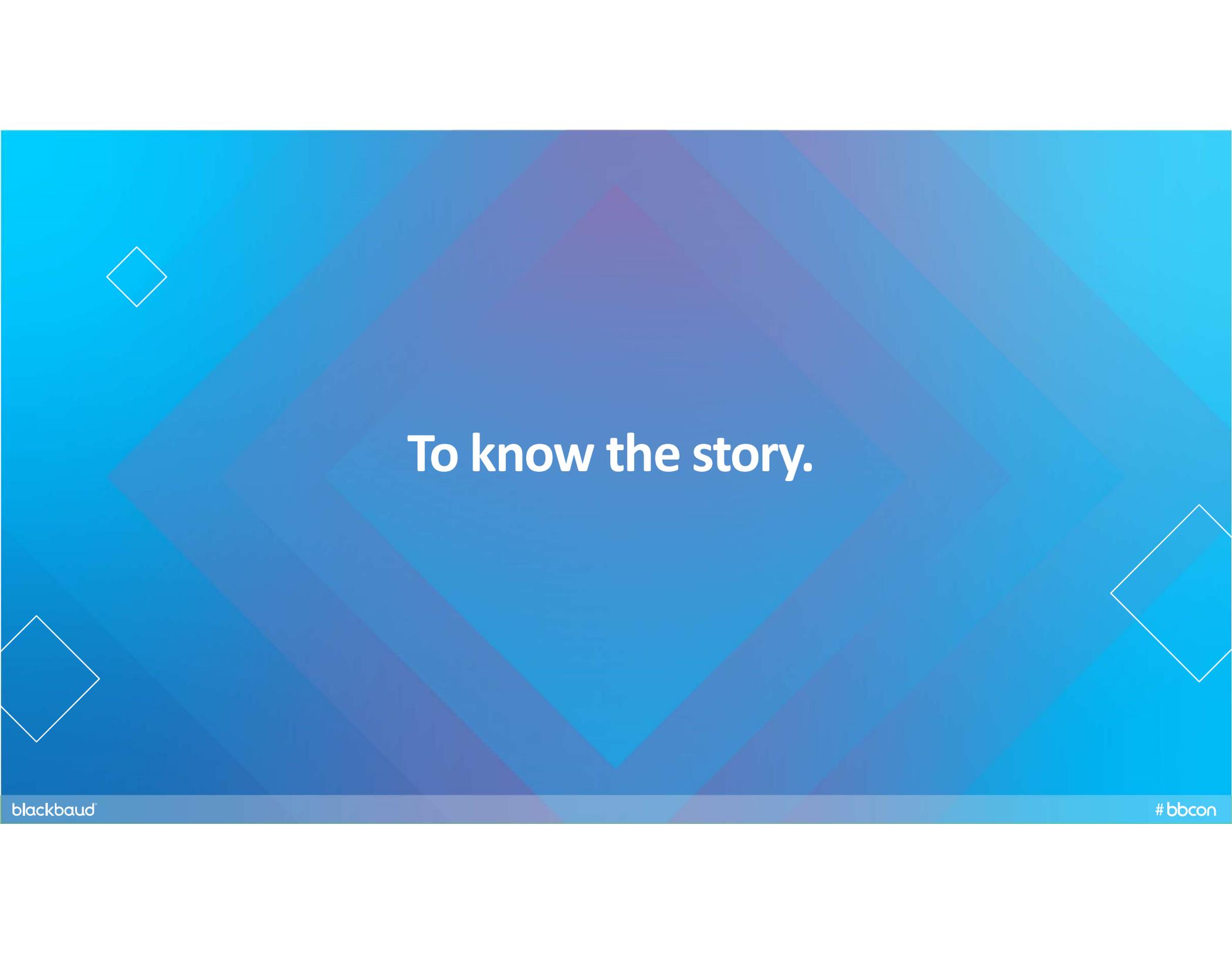
## Telling the Story

The more data you record, the  
more complete picture you have  
of a constituent.

## Telling the Story

◆ The more data you record, the more complete picture you have of a constituent.

Micro level data should make it easy for any team member to look at a profile & see how we've interacted over time.



**To know the story.**



# Telling Stories with Big(ish) Data

Ryan Hyde

# Database Managers play with their data on hard mode

- Your team wants to make data driven decisions on *easy mode* because the rest of their jobs are hard
- Effective database managers transform complicated data into something easy to understand
- The way you do this is with visual storytelling and as much data as you can get your hands on

# Telling Stories with Numbers and Dates (Get Comfortable with Math)

Excel makes math easy(ish)

- If you think it can be done in Excel, it can be.
- Look up tutorials.
- Ask questions in the community!

To tell stories, think in terms of:

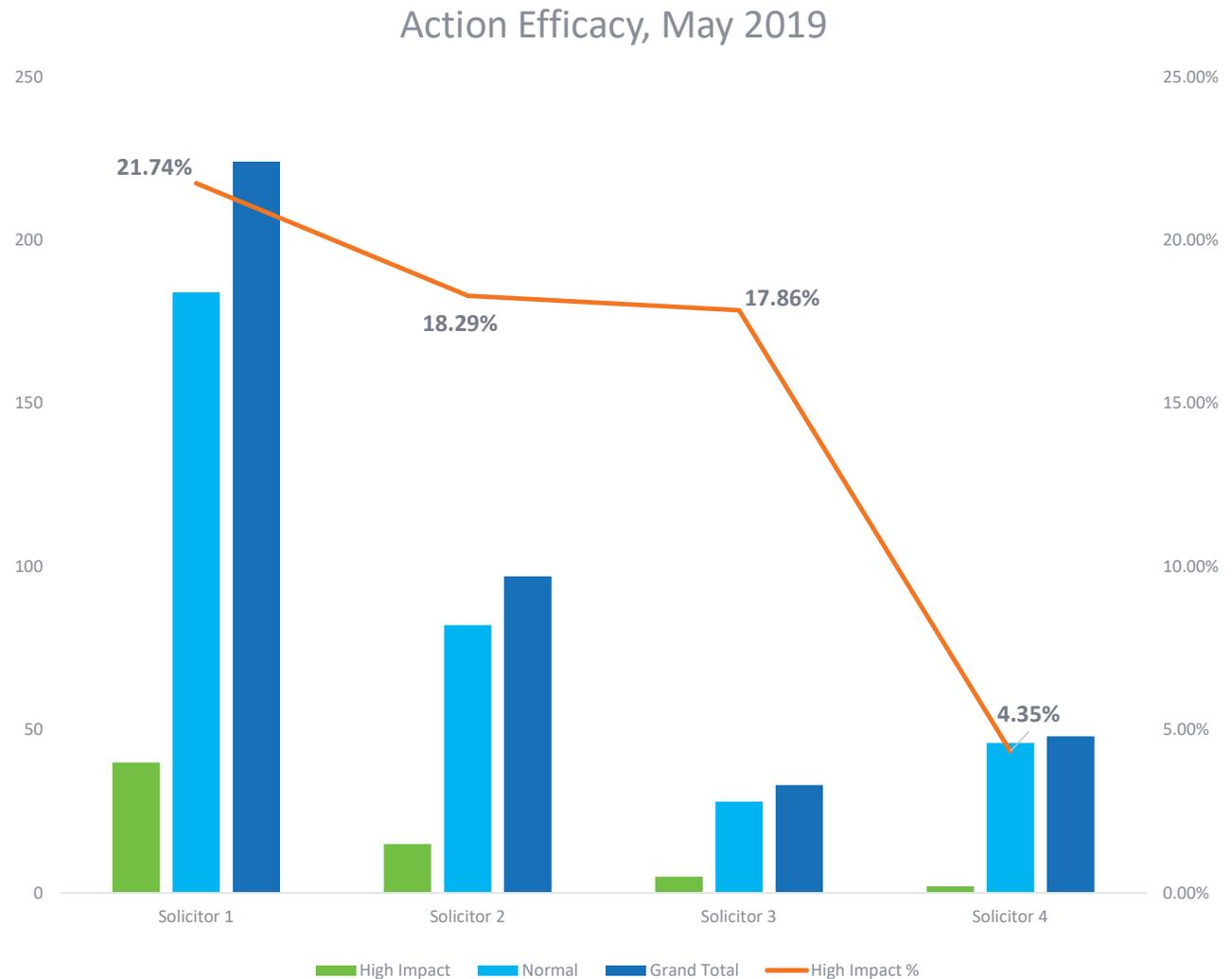
1. Changes over time
2. Percentage shifts
3. Return on investment
4. Meaningful Categories
  - *it's not always just about campaign, fund, and appeal*

**Learn to use  
your story  
telling tools,  
such as:**

1. Pivot tables
2. VLOOKUP
3. COUNTIF(s)
4. SUMIF(s)
5. Visualization selections
6. Formatting! The defaults are almost always bad

# Example: Solicitor Actions

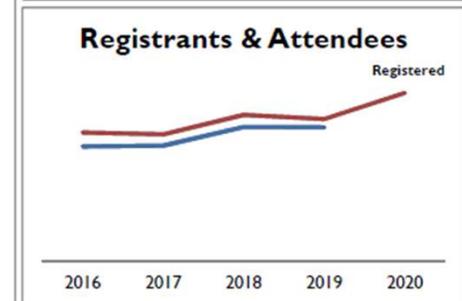
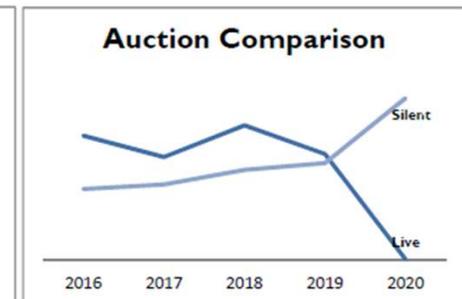
Based on a query, calculated with a pivot table, and turned into a visualization. 15 minutes of work.



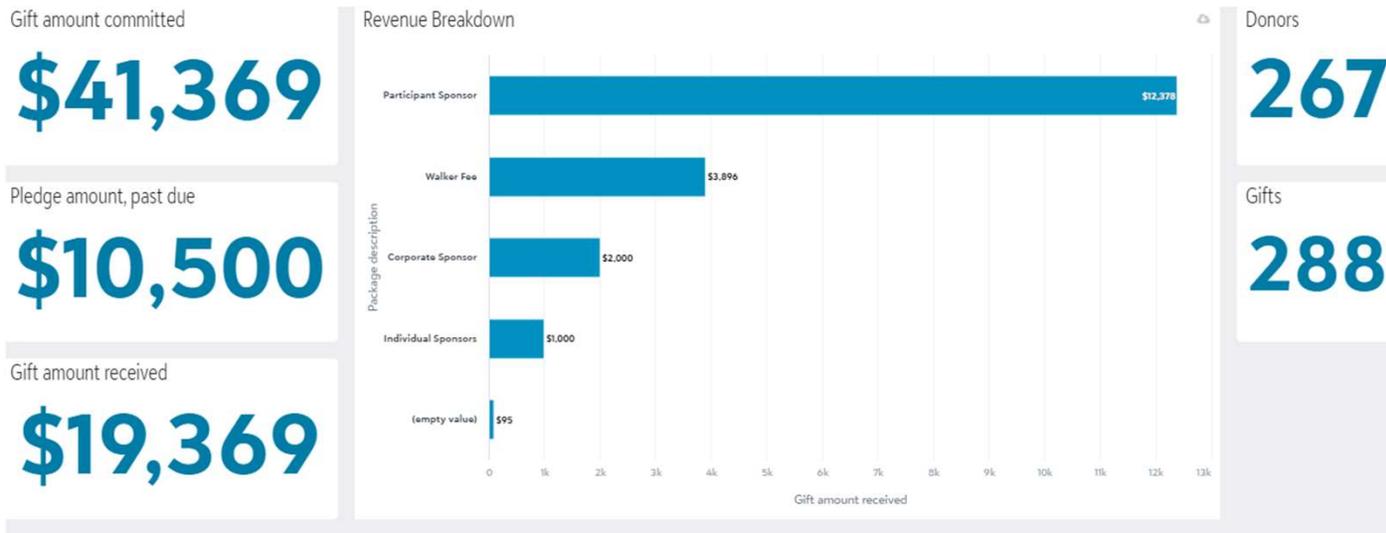
# Example: Event Reports

Events have characteristics, just like people, and they change over time. This metric tells *their* story!

	2016	2017	2018	2019	2020
<b>Total Raised</b>	<b>\$186,335</b>	<b>\$212,615</b>	<b>\$212,536</b>	<b>\$215,580</b>	<b>\$144,483</b>
# Attended	312	314	365	364	
# Registered	350	345	398	387	458
<b>Auction</b>	<b>\$37,335</b>	<b>\$34,125</b>	<b>\$43,040</b>	<b>\$38,820</b>	<b>\$31,140</b>
Live Auction	\$23,800	\$19,700	\$25,800	\$20,300	–
Silent Auction	\$13,535	\$14,425	\$17,240	\$18,520	\$31,040
<b>Appeals</b>	<b>\$37,810</b>	<b>\$56,275</b>	<b>\$42,525</b>	<b>\$56,155</b>	<b>\$13,235</b>
Raffle	\$3,375	\$2,550	\$6,375	\$7,500	–
Cash Call	\$34,435	\$53,725	\$36,150	\$48,655	\$13,235
<b>Sponsorship</b>	<b>\$70,542</b>	<b>\$81,600</b>	<b>\$79,346</b>	<b>\$83,950</b>	<b>\$38,500</b>
Corporate	\$22,500	\$24,650	\$28,946	\$38,950	\$8,000
Individual	\$48,042	\$56,950	\$50,400	\$45,000	\$30,500
<b>Table Buy</b>	<b>\$24,500</b>	<b>\$25,000</b>	<b>\$29,925</b>	<b>\$22,150</b>	<b>\$5,750</b>
<b>Tickets</b>	<b>\$11,425</b>	<b>\$7,605</b>	<b>\$9,600</b>	<b>\$9,535</b>	<b>\$1,325</b>
<b>Other Donations</b>	<b>\$4,723</b>	<b>\$5,310</b>	<b>\$8,100</b>	<b>\$4,970</b>	<b>\$54,533</b>



# Use built-in tools to tell your story!



## Pledge Details

Package description	Constituent name	Total pledged	Amount paid	Pledge balance	Amount written off
(empty value)	[REDACTED]	\$500.00	\$500.00	\$0.00	\$0.00
	[REDACTED]	\$50.00	\$50.00	\$0.00	\$0.00
Corporate Sponsor	[REDACTED]	\$2,000.00	\$2,000.00	\$0.00	\$0.00
	[REDACTED]	\$1,000.00	\$0.00	\$1,000.00	\$0.00
	[REDACTED]	\$8,000.00	\$0.00	\$8,000.00	\$0.00
	[REDACTED]	\$2,500.00	\$0.00	\$2,500.00	\$0.00
	[REDACTED]	\$2,500.00	\$0.00	\$2,500.00	\$0.00
	[REDACTED]	\$1,000.00	\$0.00	\$1,000.00	\$0.00
	[REDACTED]	\$1,000.00	\$0.00	\$1,000.00	\$0.00
	[REDACTED]	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Participant Sponsor	[REDACTED]	\$6,000.00	\$0.00	\$6,000.00	\$0.00
	[REDACTED]	\$2,000.00	\$0.00	\$2,000.00	\$0.00

# Stock Reporting: Don't tell a story that's already being told!

Compare your organization to others Data is refreshed daily  
[How it works](#)

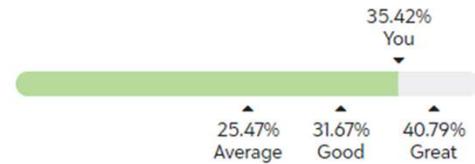
Industry 📄 Fundraising revenue 📄 Calendar year

Animal Welfare ▼ All ▼ 2020 ⌵

## Donor acquisition & retention ▲

### Retention rate 📄

Gave during the selected year and its previous year



**\$251.34K**  
Potential revenue at Great

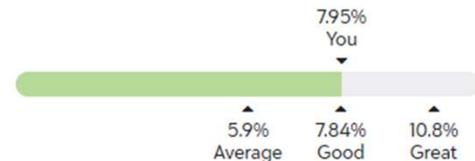
You retain donors better than others using Blackbaud solutions. Keep these donors engaged while also focusing on acquisition and recapture to bring new ones to the fold.

**Recommended links**  
[List of at-risk donors](#)  
[List of donors with recent gifts](#)  
[Retention dashboard](#)

**Best practices**  
[Sustainers in Focus](#)  
[npEXPERTS: Show the Love](#)  
[Donor Acquisition & Retention Workshop](#)  
[Immersive Best Practices](#)

### Recapture rate 📄

Gave during the selected year and two-to-five years prior



**\$93.08K**  
Potential revenue at Great

You recapture donors better than others using Blackbaud solutions. Keep these donors engaged while also focusing on acquisition and retention to bring new ones to the fold.

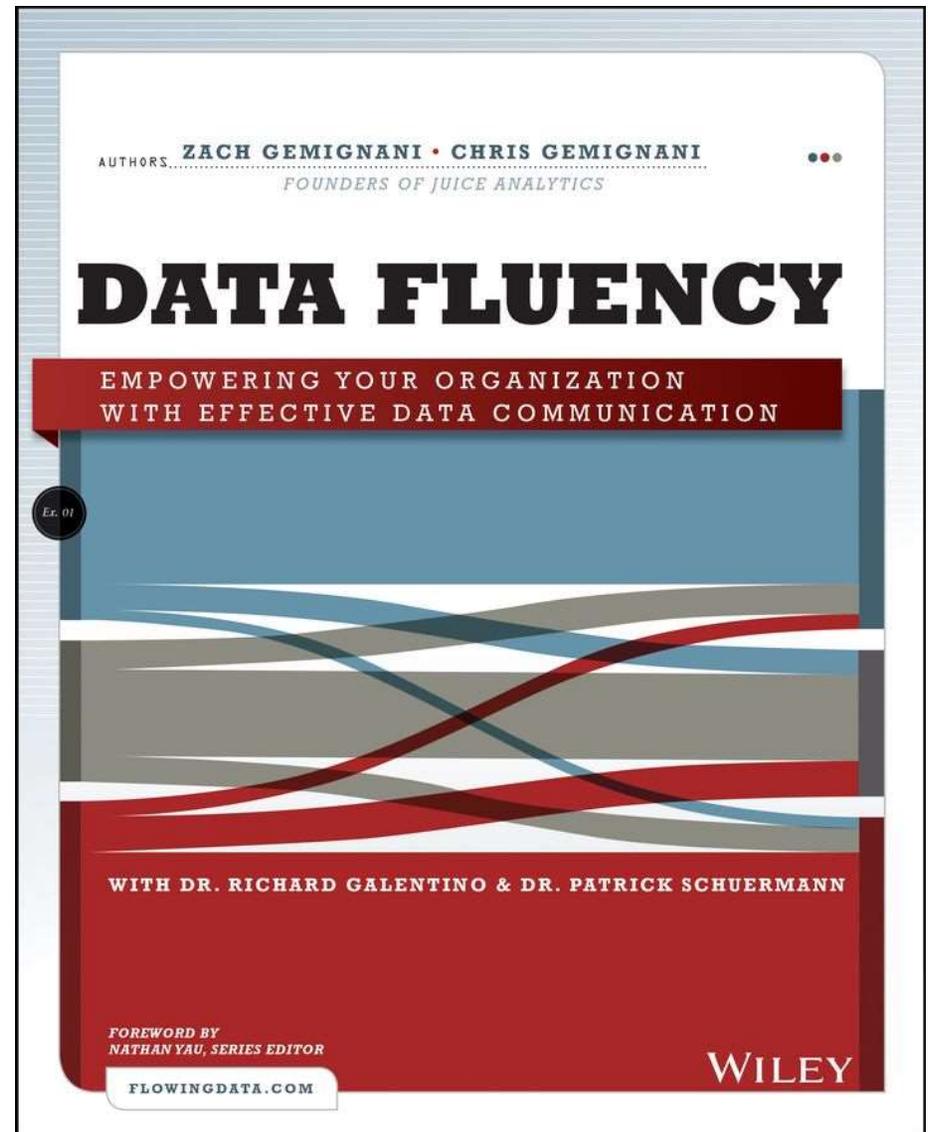
**Recommended links**  
[List of lapsing donors](#)

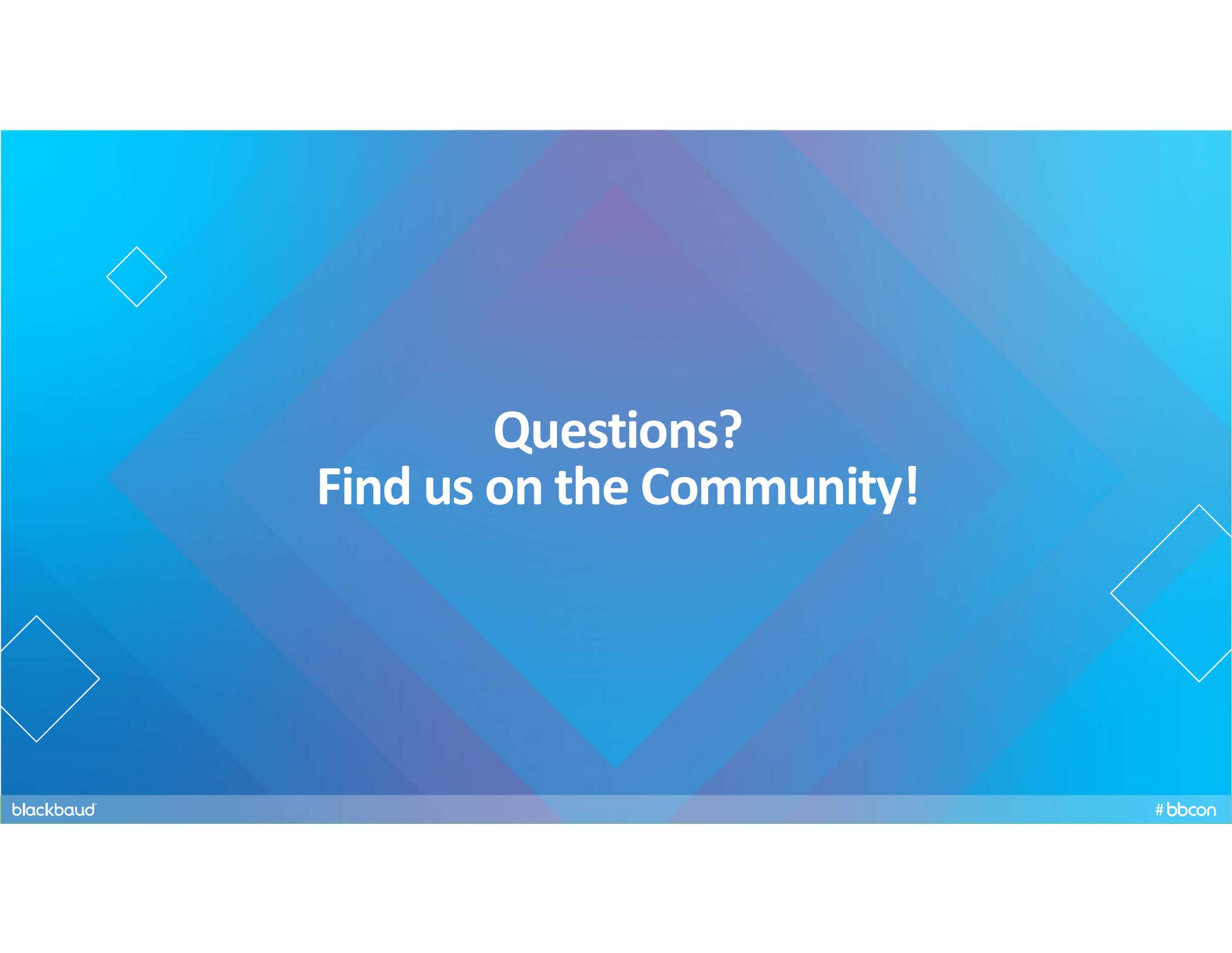
**Best practices**  
[Untapped Potential](#)

# Highly recommended!!!

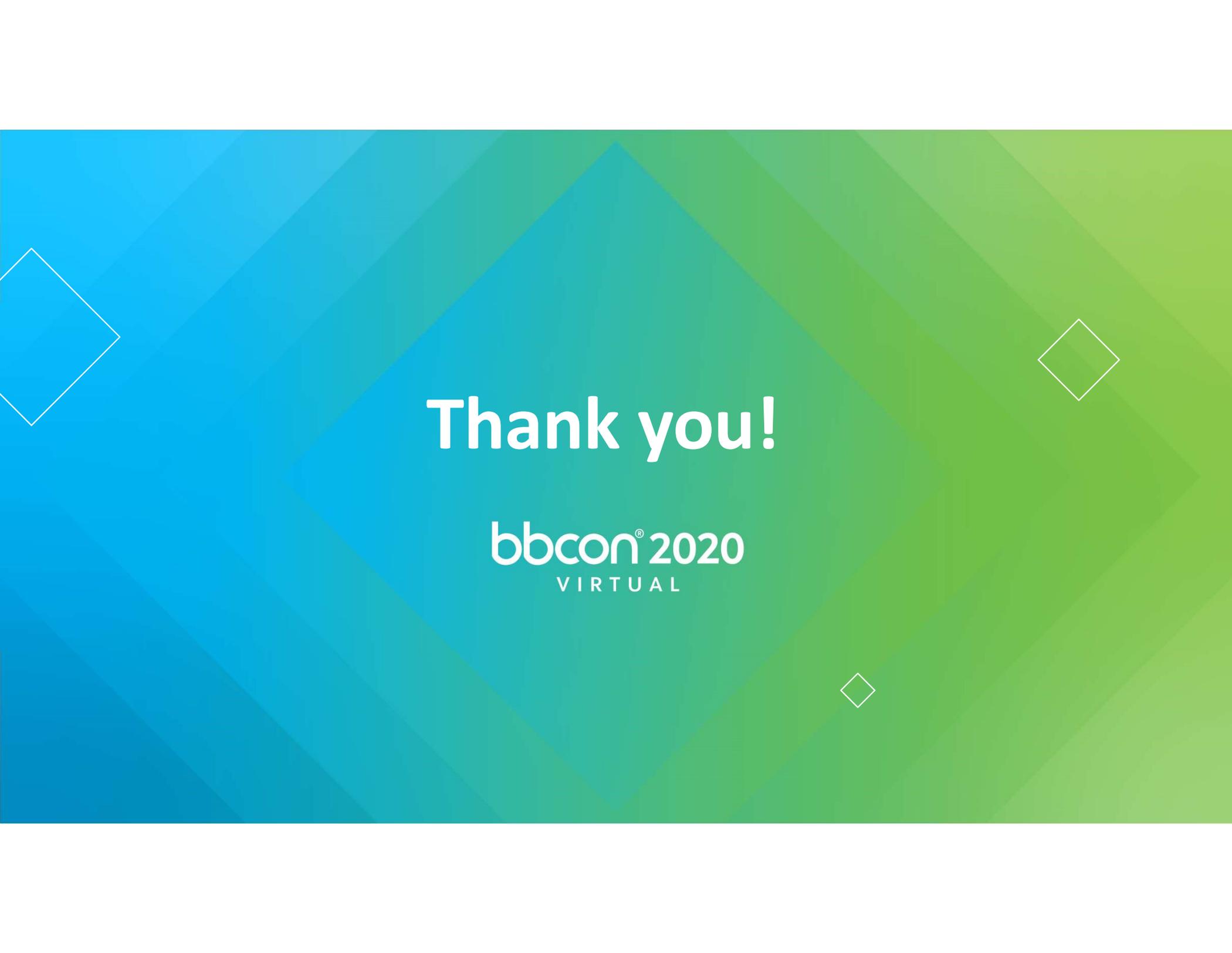
There's something for everybody:

- Organization Leaders
- Data Novices
- Experienced Analysts
- Other Stakeholders





**Questions?  
Find us on the Community!**



**Thank you!**

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