KENNARI CONSULTING

Routine Database Maintenance Schedule

Monthly Tasks

1) Review Duplicate Donors – ESPECIALLY if you're linking online giving to your database
2) Review campaign, fund, appeal data entry on donations
   a) If you cannot make these fields required during data entry, set up a monthly checks report to see if any of the fields were left blank
3) Reconcile with finance
4) Complete Intel Gathering at board/committee meetings to get to know new or major donors
5) Collect donor interactions from Executive Director, Development Director, etc.

Semi-Annual Tasks

1) Update groups/constituent codes as boards/committees change
2) Review table entries – hide old appeals, for example. Merge any that have been duplicated
3) Review Lapsed Donor Reports from events or appeals
4) Make sure emails are updated and/or synced between email provider (Mailchimp, for example) and your database
5) **Update Acknowledgement Letters**
   a) Update them regularly, depending on your gift volume. Many orgs do this monthly.
   b) Impact! When reading the letter, the donor should feel great about the gift they gave.
   c) Ahern Audit ™ – how many times does your letter say "I" and "we" versus words like "you"? It should also read between a 6th & 8th grade level.
   d) You should not have a one-size-fits-all acknowledgement letter. Think about different gifts you receive – event, appeals, sponsorships – each type should have a letter to easily merge & print.

Yearly Tasks
1) Review contact names at organizations
2) Find blank addresses
3) Delete old queries/reports that are not used or relevant
4) Clean up irrelevant custom fields/attributes
5) Update your database processes & procedure manual
6) Update wealth data if used
7) Review tribute donors and mark any inactive to avoid mailing after a year
8) Make sure you know the process of a data restore in the event of a major constituent or donation delete. This varies from tool to tool! Don't be afraid to ask them, "What happens if…."