<u>Index</u>

Accountability, clarification, 165	Benchmarks, 208
Account types, 194	development, 27–28
Accuracy, meaning, 21, 70	Benefits, events (relationship), 109–110
Accurate, complete, and timely (ACT) approach, 35–36	Best practices, 208
Address	contrast, 76
types, 214	defining, 72
verification services, 30	Blank fields, replacement, 30
Addresses/salutations, 214	Bleeding edge, 116
Ad hoc reports, usage, 185	Branding, 78
Advancement	Business associated agreements, 95
division, term (usage), 6	Business contact information, loss 178
term, usage, 3–4	Business intelligence (BI), 141, 222
Advocacy, 138	options, usage, 11
Alumni (alumnus/alumna), 215	tools, 150
relations, 104	Business process, creaning, 59–60
term, usage, 3	
Always Be Comparing (ABC), 146	Campaign, 215
American Recovery and Reinvestment Act of 2009, 95	assumption, 12–13
Analytics, 86–88, 124–127	giving
advances, 143-148	aonor type, 187t
definition, 87	range, 186t
processes, usage, 88	management, reports (types), 184–189
project, example, 87–88	planning, early stages, 81
Anecdotal information, usage, 39–40	CAN-SPAM Act of 2003, 97, 136, 222
Anecdotes	Capacity indicators, indication, 194f
impact, 208	Career-pathing, 152-156
management plan, 28	Charitable gifts, GivingUSA tabulation, 133
manager usage, 26	Check number, 194
solution, 25–28	Children's foundation, data (example), 22-23
Annual giving, 103, 104–105	Children's Hospitals and Clinics of Minnesota, front-of-
operations framework, 106t	the-line process, 21, 24
Annual restricted, 215	Client-server installations, hosting services (vendor out-
Annual unrestricted, 215	sourcing), 156
Antispamming regulation: 57	Codes, creation, 197
Appeal, 215	Coding, incongruities, 177
Application service provider (ASP), 139, 140, 222	Collegiality, 200
Arbiter/advocate	Commitments, cumulative value per donor, 186
functions, 53	Communication skills, 43–44, 199
roles, 52–68	Compliance, 92–98
Assignment strategy, defining, 198	issues, fundraising operations team management,
Association for Healthcare Philanthropy (AHP), 93, 122	93
Association of Donor Relations Professionals (ADRP), 92	opinion, consideration, 94
Association of Fundraising Professionals (AFP), 37, 122	understanding, third-party industry experts (impact),
Code of Ethical Principles and Standards, 231	93–94
Association of Professional Researchers for Advancement	Concern, gauging, 27f
(APRA), 79–80	Constituency code, 216
Statement of Ethics, 127	Constituent relationship management (CRM), 222
Attribute, 215	consideration, reasons, 137–138
Automated data processes, usage, 82	systems, 31, 137–139
1 , 3,	online contract, 66
Balance, leader maintenance, 44	Constituents, 216
Balanced fundraising operations framework, construct, 6–7	consideration, 117
Baseline policies, 198–199	CRM-type resources, 139
Batch, gift processing evaluation stage, 73	data, fundraiser delivery, 120
Behavior issues (solution), conversions (usage), 180	database, 32–33

232 INDEX

Constituents (continued)	services, 156
engagement programs, 104, 107	speed, 21–24
operations framework, 108t	balance, 19f
living deceased classification, 178	ubiquity, 122–124
reaching, online tools (usage), 134f	updating tactics, value, 31
relationships, building, 88	usage, 16
term, usage, 3	visualization, 145, 223
virtual mobility	volume, 24–25, 122–124
evaluation, 131–132	balance, 19f
relationship, 128–129 Consumer data, 124–127	struggle, example, 24–25 variation/cyclicality, 25
Contact, 216	warehouses, 144–145, 222
Contributions, receipt, 212	Data accuracy, 19–21
Conversion, 32, 59–62	balance, 19f
expense, 180	meaning, 21
implementation, equivalence, 178	measurement stick, 70
parallel processing, 178	Database
process, myths, 178–180	implementation, effectiveness, 181, 181f
transition, term (replacement), 52-53	Database, conversion, 32
Costs, benefits (contrast), 117	Data-based project, development, 92
Coughlin, Kay, 92	Deceased, 216
Council for Advancement and Support of Education	Decisions
(CASE), 37, 74, 122–123	advice, 161
Currents (magazine), 116–117, 135	improvement, 13–14
Council for Aid to Education (CAE), 37, 74	Degrees, 216
Creativity, usage, 49–50	Development executive, example, 152
Cross-cultural staff members, impact, 10 Cross-tabulation reports, 184	term, usage, 3
Coss-tabulation reports, 764 Cultivation cycle, 84–85	Digital imaging, 1,0-143
Current restricted, 215	Discipline, 200
Current unrestricted, 215	change, 147
- · · · · · · · · · · · · · · · · · · ·	Division 1 University, advancement leadership,
Data, 18–31, 176–178	167–169
accessibility, 122-124	Dolan, Tim, 162
accuracy, verification, 178	Donation, interest, 211–212
analysis, 143–144	Donor, 217
appending, 30	bank, identification, 194
availability, 69	behavior, consideration, 117
bottlenecks, 22 cleanup, reasons, 60 conversion, programming, 60–61 cubes, 144–145, 222 dictionary	Bill of Rights, 127, 232
cleanup, reasons, 60	checks (assessment), gift processing (usage), 194
conversion, programming, 60–61	database, time-intensive profile generation, 84
cubes, 144–145, 222	records, inaccuracy/incompletion, 176
dictionary appearance, 189	relations, elements, 89–90 Donor-centered fundraising, 196
development terms, 214–21	Donor-driven fundraising, 196
sample, 211	Downsbrough, Bruce, 169–170
usage, 184	,
enhancement	Early-adopter advantage, 116, 146
options, awareness, 29–30	Email addresses, inaccuracies/loss, 176-177
techniques, team leverage, 29	Endowment, 217
entry exception log, 180t	Engagement, 138
exception log, appearance, 180	management, 65–66
extraction, 61	Enterprise resource planning (ERP), 138–139
impact, finding/usage (value), 154t	Entry, gift processing evaluation stage, 73
leverage, fundraising (impact), 80	Ethics, 124–127
maintenance, 68–70	Events, 104, 107–110, 217
tactics, value, 31	benefits, relationship, 109–110
marts, 144–145, 222	operations framework, 109t
mining, 145, 223	Evolving technologies, applications (usage), 136–143
perception, importance, 28 points	Exception management, 26, 28
assessment, sample, 71f	Executives
sale, 125	decisions, making, 172–174
problems, signs, 176–178	Executives, confidence levels, 17t
process, cleaning, 59–60	Expectation management, 65–68
programming, technical tips, 60–61	Expectations, 138
quality	experience, impact, 166
calculator, 179f	External relations team, 6
measurement, 71f	Extract, transform, and load (ETL), 145, 223

Family Educational Rights and Privacy Act (FERPA),

Financial Accounting Standards Board (FASB), 74, 100,

Fair Credit Reporting Act, 125 False positives, occurrence, 82

Family programs, special cases, 111-113 Fast/efficient, terms (contrast), 22 Fighting fires, metaphor, 23-24

gift processing evaluation stage, 73 process, volume, impact, 90 Finance, 94, 98-101

501(c)3 nonprofit organizations, duties, 9-10

Internet applications, impact, 131-132

team members, salaries/benefits, 42 technology applications, 31-32 understanding/interpreting, 45

problematic requests, usage, 77 reports, importance, 37–39 Fundraising operations, 2-14 alternatives, 3 components, 5-7 importance, 17t consultants, 164-166 examination, 16 fundamentals, usage, 121 outsourcing, 157 principles, 15 clarity, 115 reporting, 144-145

responsibilities, variation, 7f, 52f stewardship, impact, 92

FundraisingOperations.com, 175-176

evaluation, initiation, 16-17

operations, improvement, 16

charitable donations, impact, 70-71

responsibility, 33, 51

term, meaning, 3-4 tools, 175

Fundraising organizations

Fund solicitation, 96

tax/revenue authorities, impact, 94-95

success, 209

team inclusion, 5

93-94, 221 impact, 96

Finalization

Friend, 217

Fund, 217

222 Financial reports, 37-38 Fit-gap analysis, 56 Fit-gap table, usage, 57t Fit score summary, 58t

Foundation, term (usage), 3

Fundraisers, data delivery, 120 Fundraising, 217

analytics, adoption, 86-87 appreciation, 200

organizational fit, 2-14 procedures, factors, 21-22 programs, impact, 103 progress reports, 38 reporting, impact, 92-93 results, reduction, 64 staff-to-results ratios, 9 support, 2

Fundraising executives advice, 162-172

Front-of-the-line process, 24, 193f

	INDEX	2:
Garbage-in-garbage-out, 60		
Gartner, Hype Cycle, 53–54 Generally accepted accounti		ιP),
100, 222		
Gift appeal, 213		
Gift date, 213 Gift processing, 70–75		
components, 73f		
effectiveness, 192f		
evaluation		
process, 190		
stages, 72-73		
flow chart, 74f	400	
front-of-the-line approach	1, 193	
immutable policies, 75		
lockboxing practice, 141 success, measurement, 72		
Gift-related terms, 212–214		
Gifts		
data dictionary, 211-212		
parameters, 212		
Gift subtype, 213		
Gift type, 214		
Global privacy, 97–98 Governmental Accounting S	ton donds Boond (C.	A CD\
100, 222	nandards Doard (G	ъъ),
Grateful patient		
components, 1146		
program 153		
development, 112–113		
workflow, example, 11.	3f	
special case, 111–113		
Hard credit, 212		
Hasseltine, Don, 166–167		
Healthcare fundraising, spec	ial cases, 111–113	
Healthcare operations, 112	,	
definition, problems, 93		
Health Information Technol		Clinic
Health (HITECH),		
Health Insurance Portability 1996 (HIPAA), 93, 1		Act of
High-volume data maintena		
High-volume processes, effic		-107
Hosted, meaning, 139		
Household, 217		
Human resources (HR), 98-	-101	
Hype Cycle, 53		
stages, 53-54, 54f		
Identification, 84		
stage, 86		
Impact, measurement, 150-	152, 206f	
T 1 1 1	1000	

```
al
                                                     f
Impact measures, calculation, 190f
Implementation
  planning, requirement, 83
Implementation, executive role, 62-63
Inefficiencies, location/repair, 165-166
Information, action conversion, 45-46
Information technology (IT), 98-101
  hardware/networking, usage, 51
In-memory databases, 144, 222
Innovations
  cost, example, 118f
  location, 167
  progression, 113-114
  usage, determination, 116
Institutional, term (usage), 3
Intake, gift processing evaluation stage, 72
```

234 INDEX

Internal Revenue Service (IRS), publications, 94, 110, 221	environments, 168
Internet applications, impact, 131–132	framework
Interpretation skills, 200	components, 5f
Phone expectation, 119	imbalance, 6f
Key, Roby V., 167–169	fundraising executive valuation, 42
Key performance indicators, creation, 72	impact, 10
key performance indicators, creation, 72	impact measures, creation, 151f
Language, usage (consistency), 189	improvement, 16
Last year, but unfortunately not this (Lybunt), 217	leadership, 43–46 maintenance, 147
Leadership	names, 4
collegiality/persuasion, 46	organizational factors, impact, 8–13
placement, 163	organizational type, impact, 10
records, inaccuracy/incompletion, 176	perception, importance, 17
skills, 43–44	productivity, confidence, 4
List, comprehensiveness, 189	professionals, confidence levels, 17f
Logistics, impact, 137	report, impact (sample), 153t
Lost constituent searches, 30	staff performance assessment, 201–204
Lybunt, 217	staff survey, appearance, 194–196
M '1' 1' - 247	survey, sample, 195f
Mailing list, 217	term, broadness, 2
Major giving, 103, 104 operations framework, 105t	Operations team
Management by walking around (MBWA), 26	benefits, 140–142
Managers	data maintenance process, 70
anecdotes, usage, 25–28	impact measures, calculation/establishment process,
mobility, relationship, 130–132	189
Matching gift, 213	preparation, 61–62
Meetings sessions, establishment, 198	prioritization, assi ta. ce, 67–68
Membership relations, 104	speed-base 1 c. rocatations, achievement, 23
Mobile devices, 136–137	time, zero-su. y game, 23 virtus lization/mobility, relationship, 129–130
Mobility, 127–132	Operation, team members
constituents, relationship, 128-129	cha exteristics, 199–200
manager, relationship, 130-132	discipline, 48
team/virtualization, relationship, 129-130	istening/translating/interpreting, 47–48
Multilingual staff members, impact, 10	new positions, signs, 200–201
Multiple gift parameters, 212	skills, requirement, 46–50
Multitasking priorities, 200	transition refusal, 64-66
MySpace, problems, 118–119	work, remoting, 131
Nisional Association of College and Halinguist Property	Opinion, consideration, 94
National Association of College and University Business	Organization
Officers (NACUBO), 74 National Change of Address (NCOA), 29–30, 221	data, 18–31
National Survey of College and University Parents	addition, costs/impact, 176t
Programs, 96	enhancement/improvement, 28–31
Negotiation, 59	maintenance, 68
Net worth, absence, 83	division names, 4t
New donor, 217	improvement, research profile process (usage), 83–84
New staff, considerations, 148–158	maturity, 11–12 measures, 27
Nondonor, 218	operations, foresight/work (benefit), 11
Nonprofits	out-of-the-box/vanilla installation, 180
programs, 103–104	planning/resource availability, matching, 81–82
third-party applications, importance, 132	size, 8–9
Nonsolicitation activity, 5	structure, 9–10
Numeric aptitude, 199	title, issue, 4
01 4406	type, impact, 10
Obama campaign, cost, 118f	user transaction, social media (usage), 132
Obama effect, 117	Other duty as assigned, research, 80
Objective feedback, location, 168	Outcomes, achievement, 197
Objectives, 197 Office phone system, learning, 131	Out-of-balance data issues, 6
Online Analytical Processing (OLAP), 145, 223	Outsourcing, 156–157
Online Transaction Processing (OLAP), 145, 225 Online Transaction Processing (OLTP), 145	Parent, 218
Open Stream API, 126	Parent fundraising efforts, 96
Operational harmony, 206f	People, 41–50
Operations	information, 126
arrangement, comprehensiveness, 98	knowledge/understanding, 42
components, importance, 17t	usage, 16
environmental factors, impact, 8–13	Perception, difficulty, 29
-	

Performance	system
considerations, 148–158	charter, 196 initiation, 196–199
indicators, adoption, 198 management	Prospect manager (PM), 218
maturity model levels, 202t	Prospect profile, sample, 188f
model, 150	Prospect reports, 184
model survey, 203	Prospect research, 84
measurement, 149–150	expectations, 81f
measures, application, 150	protocols, usage, 80
reports, 38–39, 184	screening, replacement, 82
Performance Management Maturity Model (PMMM),	Pulawski, Christina, 164–165
166–167	Purchase Card Information Data Security Standards (PCI
Personal Information Protection Act, 98	DSS), 96, 221
Personal Information Protection and Electronic Docu- ments Act (PIPEDA), 97–98, 222	Quick response codes (QRCs), 137
Personalized stewardship, fundraising operation support	Quick response codes (QRCs), 137
(requirement), 90–91	Real Simple Syndication (RSS) feeds, 138
Pesch, Theresa (Children's Hospitals and Clinics of	Recognition reports, 39
Minnesota Foundation), 163–164	Records
Phone numbers, inaccuracy/loss, 176	duplication, 177
Pipeline, 85	obsolescence, 177
reports, 184	Regulations/controls, 74
sample, 185f	Relationship, 218
Planned giving, 103	Remote access, installation /u. age, 131
Plastic Card Security Act of 2007, 96–97	Reporting, 34–39, 75–79, 182–189
Pool, 85	access/responsiveness 79
Pool reports, 184	accurate, complete, and timely (ACT) approach, 35–36
Portable skills, cultivation, 165	advances, 143-148
Portfolio, 85 reports, 184	data ve lu., e, relationship, 124 environn, ent
Predictive modeling, 145, 223	comparison, 146–148
Priorities, balancing ability, 44	th ndraising operations, development/maintenance,
Prioritization, expectation management (impact), 67–68	76
Privacy	qualities, 182–184
differences, 69	examination, 77
regulations, 158	quality, 35–37
variation, 69	transition cycle, 61
variation, 69 security, relationship, 95–97 Privacy Rules, 95, 112 Private banking client, 194 Problem isolation, 205 plotting. 205–207	usage, 16
Privacy Rules, 95, 112	Reports
Private banking client, 194 Problem	catalog, usage, 184
isolation, 205	creation, 198 format/branding, 78
plotting, 205–207	prioritization format, 78t
solution, 207	types, 37–39, 184–189
starting points, 207–209	Request processes, 189
usage, 49–50	Requirements/framework, executive role, 55–56
Processes, 156, 189–199	Research, 80-84
effectiveness, fundraising executive evaluation, 39-40	process, team evaluation, 82
limitations, 90	profile process, usage, 83–84
responsibilities, 39–41	Resources
usage, 16	adoption, 147
Program reports, 38	implementation, opportunity costs, 147
Program support, 103 Progress report, 184	Resources, access, 139–140 Results-Only Work Environment (ROWE), 157–158, 223
charts, sample, 35f	approach, benefit, 158
tables, sample, 20t	Return on investment (ROI), measurement, 150–152
Project data, 123	Roles
Prospect development, 79–88	clarification, 165
fundraising operations team responsibility, 79-80	creation, 197
Prospect information, tracking, 85	Rollout period, defining, 198
Prospect management, 84–86	
baseline policies, 198–199	Sabotage, 66
guidelines, focus, 197	Satellite offices, impact, 10
implementation, ten-step plan, 197–198	Schnabel, Paul, 172
objectives, 197	Scholarship reports, creation (components), 91f Scorecard
outcomes, 197	
reports, types, 184–189 roles/responsibilities, 85f	executive value, 56, 59 sample, appearance, 182
rores, responsionides, our	sample, appearance, 102

236 INDEX

Scott, Rob, 171–172	adoption, 63f
Screening	change, 208
implementation plan, requirement, 83	evolution, applications (impact), 136–143
problems, 83	exploration, 12
replacement, usage, 82	management, 51–68
Security, privacy (relationship), 95–97	needs determination, fit-gap table (usage), 57t
Selection process, executive role, 54	options, fit score summary, 58t
Service orientation, 46–47	oversight, delegation, 34
Shadow databases, executive awareness, 64	projects, Hype Cycle (Gartner), 53–54, 54f
Shared definitions, 78	selection, weighted scorecard, 183f
Short Message Service (SMS), 97	transition cycle, 55f usage, 16
Side systems, cause, 66	vendors, hosting service outsourcing, 156
Single gift parameters, 212	
Skype, usage, 130 Smartphone, retrieval/learning, 130–131	Telephone Consumer Protection Act of 2003 (TCPA), 97,
	*
Social media	136, 222
inform, 132 mania, 132–135	Text messages, usage, 97
	Time, zero-sum game, 23
Hype Cycle, impact, 135	Time-intensive profiles, generation, 84
websites, fees, 159 Soft credit, 213	Training, 209
	effectiveness, fundraising executive control, 41
Software-as-a-Service (SaaS), 66, 127, 139–140, 222	efforts, evaluation, 191f
Solicitation, 84 Solicit codes, 218	obstacle, 65
Solicitor, 218	outcomes, gauging, 190 process, 40–41
	Transitions
Some year, but unfortunately not this (Sybunt), 219 Sort key, 218	failure, 63
Special constituencies, 104, 110–114	roles, 52–68
Special initiatives, 104, 110–114	
operations framework, 111t	steps, 54–63 Translation skill. 200
Species survival plans (SSPs), 128	Trends, 115, 158–160
Speed	assessment, 209
benefit, 141	
imaging, alignment, 140–141	det. component, 123 novement, 158–160
maturity, relationship, 166	
	principles, application, 120–132 Tributes, 214
Speed-based expectations, achievement, 23 Spousal records, confusion/loss, 177	Turnaround times, quickness (importance), 21
Spouse, 218	rurnaround times, quickness (importance), 21
Staff, 199–204	Universal Postal Union (UPU), 29
roles, defining, 197	Unrestricted giving, 103, 104–105
Staffing, fundraising budget, 9	Onlestricted giving, 103, 104–103
Standard exclusions, 218	Video calling, 159
Standard Query Language (SQL), 145, 223	Virtual desktops
Stay plans, 152–156	access, 129
focus, 155	usage, 128
impact, 155–156	Virtualization, 127–132
Stewardship, 84, 88–92, 218–219	team/mobility, relationship, 129–130
components, 89	Virtual mobility, constituents (mobility), 128–129
evaluation, framework, 89f	Virtual private network (VPN), 222
people-focused elements, 90	usage, 129–130
processes, complexity, 91	Volume
Stoic approach, 159–160	defining, 206f
Story, sharing, 138	imaging, alignment, 141–142
Strategic action, 182	Volunteer, 219
Strategy	voluncei, 21)
change, 147	Wealth-screening process, data availability/privacy differ-
sessions, establishment, 198	ences, 69
Success	Web applications, 127–132
measurement, 72	Web-based resources, usage, 11
measures, 69–70	Whelan, Don, 167–169
Sybunt, 219	Widow group, 87
System limitations, 90	Work, amount (completion), 24
2y 300111 11111tations, 20	work, amount (completion), 24
Technical aptitude, 199	Year, 219
Technical aputude, 199 Technical/numeric aptitude, 48–49	1041, 217
Technology, 31–34, 178–182	Zoilo, John, 170–171
5,, 0. 0., 1.0 102	,,_,_, ., v ., .