

Watch the webinar here:

<https://youtu.be/uMGdLr1hOhg>

ToucanTech Webinar

Organise your donor data in 100 days

Who am I?



- Data nerd: “married to the database”, “photocopier whisperer”, “that weirdo who loves GDPR” and my current favourite: “plugged into the matrix”
- Favourite lockdown activity: curating my beautiful database
- Excited to complete post-lockdown: full data audit at Marymount to ensure compliance with GDPR (*yay!*)
- Adopted new puppy, Echo



Get a head start on organising your donor data

- You might be returning to the office or still working remotely, but you're ready to hit the ground running!
- To know where you're going, you need to know where you are
- How do you know where you are?
- All of these can give you great snippets of information and an overall picture of the situation – *your database data, or lack of, will shine a light in the corners no one wants to go to!*



My experience in joining established development offices

- Donation data often patchy, and there's not very much to go on for stewardship
- Huge gaps in certain fields
- Records held together/ missing records
- Data in the wrong places
- NO WRITTEN PROTOCOLS (sigh – GDPR anyone?)



First things first... know who your donors are!

- Spend time looking for your donors on your database.
- Check with your accounts/ business team – whoever is responsible for Gift Aid claims/ checking against bank statements
- Check in electronic and physical files: does the database accurately reflect the correspondence that you have? Scan things in, or with ToucanTech you can sync your email correspondences!
- Are some gifts still 'real' or are they ready to be written off?

Fundraising



Use this donor pipeline to track potential donors at different stages of a fundraising campaign. You can display all donors together or filter the pipeline to show an individual Fund or Sub-Fund. Click on the "Set Up" tab to edit the stages of your pipeline and your default currency for donations.

FUNDS

DONOR PIPELINE

DONATIONS

PAYMENTS

SETUP

Select Fund or Sub-Fund

All x

+ ADD TO PIPELINE

EXPORT

DONOR PIPELINE SET UP

1	2	3	4	5	6
£ 200.00	£ 9,422.00	£ 40,500.00	£ 78,000.00	£ 19,984.00	£ 4,300.00
Rory Evans	Jane Doe	Amy Da Costa (Delahunty)	David Ames	Kitty Johnson	Sian Jones (Fleming-Jones)
Liberty Wines	Jason Hewer	Jon Snow	John Martin	Amy Da Costa (Delahunty)	Toucan Tech
Jeremy Usborne	Thomas Slater	Edward Morley-Smith	James Mc'Avoy	Jon Snow	Kitty Johnson
Merryn Parks	Ed Suchy	Joan Hopkins	Hugo Ribeiro	Michael Michael	
	Ed Suchy	Emma Johnson	John Martin	Ned Stark	
	London Beer Factory	Jaime Lannister	Gary Barlow	Mehdi Jawad	
		Jan Smith	Gary Barlow	Michaella Ubald	
		Robbie Williams	Jaime Lannister	Nuno Fernandes	
		Catherine Spencer	James Bond	Michaella Ubald	
			James Dyer	Sophie Jillings	

Gaps in certain fields

- This can seriously affect your mailing segmentation
- Identify the gaps – could be as simple as gender, title, preferred name, salutation
- Put in regular cleaning protocols – ask questions regularly of your database. For example: do any individuals have a blank title field?
- Problems can occur when individuals move house or change their last name - ToucanTech functionality enables you to pull certain fields into a mass email to send to a group of people to ask them to check their data and update if required!

View options

☐ Group records by user id ☐ Collapse collated records

 GENERATE / REFRESH TABLE

COMMIT TO DATABASE

CANCEL UPDATES

140 records in this report 1 record selected

EXPORT

Please enter a new table name here to save ...

Select a report category

SAVE TABLE

DELETE TABLE

CLEAR SELECTION

<input type="checkbox"/>	⚡ First Name	⚡ Last Name	⚡ Current city	House Merged	What careers events are you e ...	Select a report category
<input type="checkbox"/>	Jessie	Morley-Smith	Bristol			
<input type="checkbox"/>	Alex	Milne	Cirencester			
<input checked="" type="checkbox"/>	Christine	Porter	<input type="text"/>			
<input type="checkbox"/>	Anna	Newman	London			
<input type="checkbox"/>	Laura	Jones	Bristol			
<input type="checkbox"/>	Catherine	Fowler	Taunton, Somerset			
<input type="checkbox"/>	James	Dyer	Wellington			
<input type="checkbox"/>	Kayla	Rose	London			
<input type="checkbox"/>	Natalia	Hill	Newcastle			
<input type="checkbox"/>	David	Ames	dave2000			
<input type="checkbox"/>	August	Wilkes	Chicago			
<input type="checkbox"/>	Nicholas	Durrant	Cape Town			
<input type="checkbox"/>	Kazmer	Nagy-Betegh	London, United Kingdom			
<input type="checkbox"/>	Ned	Stark	Winterfell			

Edit data in column
Make a global update to column
Sort by this column
Sort by this column in reverse

One record – one person

- Trust me on this one - you can thank me later
- Problems such as tracking consent preferences, or activities such as attending events, occur frequently in records with more than one person
- Save yourself a lot of hassle separating them down the line.
- Even with joint Gift Aid claims, it's worth it.
- Mail-as-one salutations and addressees are the answer
- Check for duplicates

Select a filter category

Expand the categories on the left and drag and drop

Duplicate Records

Duplicate names
First name

AND

Duplicate names
Last name

Records

MANAGE RECORDS

MANAGEMENT FIELDS

GROUPS

OPTIONS

STRATORS NEW

Record

-- All --

Individual

Keywords

YOUR

ADVANCED

NAME

EMAIL

USER GROUP/S

STATUS

DATE OF BIRTH

ACTIONS

2 records found matching your search criteria

CLEAR FILTER

2 records selected

+ FLEXIGROUP REMOVE/ADD USER GROUP EMAIL LOG ACTIVITY EXPORT CALC CLASS OF CLEAR SELECTION MERGE RECORDS

Show 40 entries


Customise the table columns

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jessica Rees	jess@toucantech.com	Former student	Online Profile	ACTIONS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jessica Rees	jessichu@live.co.uk	Under 18	Online Profile	01 January 1991 ACTIONS


Showing 1 to 2 of 2 entries

Merge selected records

Choose the primary record



Name: Jessica Rees
Status: Online
Creation date: 26 Mar 2018 12:57:41



Name: Jessica Rees
Status: Online
Creation date: 26 Apr 2016 12:38:10

Select one 'lead' online record
(Login details will come from the selected record)

☒ Jessica Rees ☐ Jessica Rees

CLOSE

BACK

NEXT

Data in the wrong places, or completely inappropriate data

- Long notes that you can't search through?
- Flags/attributes that no-one understands?
- Figure out what data is in there by looking at sample records and start figuring out what you need to keep, and what needs to go.
- This will need to grow and adapt as you go.
- Create simple data entry rules for teams with multiple people entering information - such as naming conventions for logging events & communications
- It's helpful to have an audit log of every change and which admin made the edit in case you'd like to check more details with them
- Refer to your record retention policy. If you don't have one... make one!

Note category

Activity

Automated

Careers

Contact form

Deceased

Email contact form

Family

Fundraising

General

Important

-- Any --

ORY

NOTE

Kate sp

ar 13

06 Feb 2018

General

Organisation(s): Accenture , Academie Grenoble , Liberty wines , Sutton Park School

User groups:

1 - Affinity level (offline) ✕

2 - Affinity level (offline) ✕

Former Parent (offline) ✕

Former student (2004-2011) ✕

Friend of the school (offline) ✕

Guest donors ✕

Parents (offline) ✕

VIP Donor (offline) ✕

«hide

Flexi groups: ?

Former Students in London

Mentors who live in London

SUMMARY

ONLINE/PROFILE

OFFLINE/RECORD

NOTES

FUNDRAISING

ACTIVITY TRACKER

CAREERS

RELATIONSHIPS

DOCS

ADMIN

+ ADD NOTE

Note category

Click here to select

Date

Select an Option

Date From

Date To

Logged by

Select an Option

Important

-- Any --

Keywords

Type keyword...

DELETE

CLEAR

FILTER

	LOGGED/ UPDATED	NOTE CATEGORY	NOTE	LINKED TO	IMPORTANT	VIEW/ EDIT
<input type="checkbox"/>	09 May 2019 Kate Jillings-Murray	Careers	Kate spoke to Amy Da Costa about internships at Accenure for Ye ar 13 students	Accenture, Amy Da Costa (Delahunty)		
<input type="checkbox"/>	06 Feb 2018	General	Previous Last name was Delahunty and has been changed to Da Costa by Amy Delahunty.	Amy Da Costa (Delahunty)		
<input type="checkbox"/>	Logged 26 Mar 2020	Automated	Previous First name was Nathan and has been changed to Amy b y amy-delahunty.	Amy Da Costa (Delahunty)		
<input type="checkbox"/>	Logged 26 Mar 2020	Automated	Previous Salutation was Mr and has been changed to Mrs by amy -delahunty.	Amy Da Costa (Delahunty)		
<input type="checkbox"/>	Logged 23 Mar 2020	Automated	Previous Salutation was and has been changed to Mr by amy-dela hunty.	Amy Da Costa (Delahunty)		

GDPR compliance

- We all know what it was like in 2018 – and it's not getting any easier!
- Make sure you're complying with existing policies.
- Got a team? Over the next few months, review your processes for handling data. Build a template to make it easier!
- If it's just you, give yourself time to go through original processes against any new updates. Having your ducks in a row early will allow you to glide through any investigation.

GE RECORDS

TRATION FIELDS

GROUPS

S

ENT OPTIONS

TUTIONS

INISTRATORS NEW

Manage Consent Options

[VIEW EMAIL TYPES](#)

[+ ADD CONSENT OPTION](#)



[Read more about consent options here](#)

Order	Current Consent Options	Opt-IN count	Email?	Where is the consent being captured?	Last edited
	I am happy for my data to be stored on this database (This option cannot be removed or edited) ?	336		Auto-opt in on registration	03 Apr 2018 (Mehdi Jawad)
⬆	⚙ I am happy to receive email communications from the Toucan Community	132	@	Registration, Profile, Events	09 Nov 2018 (Sian Jones (Fleming-Jones))
⬆	⚙ I'm happy to receive occasional fundraising updates by email	55	@	Profile	14 May 2020 (John Martin)
⬆	⚙ I am happy to get the Toucan Magazine by email	65	@	Registration, Profile	17 Apr 2020 (John Martin)

Consent check form

You can use this form to capture (or update) consent options for your database records (online members and/ or offline records).

[GO TO FORM](#)

Capture opt-outs (as well as opt-ins) at registration

Consents on your website registration form are set by default to capture an 'opt-in' tick box (or leave unticked and remain 'unspecified'). Activate this feature if you'd like to force people to choose (with radio buttons) to either 'opt-out' or 'opt-in' for all consent options shown on your registration page

Off

Consent check at log-in

Activate this feature to show a consent check screen at 6 month intervals when an online member logs in

Off

Amy Da Costa (Delahunty) [Online profile](#) Class of 2010

D.O.B: 29 June 1993 (age 27)

Organisation(s): [Accenture](#) , [Academie Grenoble](#) , [Liberty Wines](#) , [Sutton Park School](#)

User groups:

[1 - Affinity level \(offline\)](#) [2 - Affinity level \(offline\)](#) [Former Parent \(offline\)](#)
[Former student \(2004-2011\)](#) [Friend of the school \(offline\)](#)
[Guest donors](#) [Parents \(offline\)](#) [VIP Donor \(offline\)](#)

[-hide](#)

Flexi groups: ?

[Former Students in London](#) [Mentors who live in London](#)

[SUMMARY](#) [ONLINE/PROFILE](#) [OFFLINE/RECORD](#) [NOTES](#) [FUNDRAISING](#) [ACTIVITY TRACKER](#) [CAREERS](#) [RELATIONSHIPS](#) [DOCS](#) [ADMIN](#)

Type new password

Updated on 14 Aug 2019 by [Joao Barbosa](#)

[Show Previous Addresses...](#)

[+ ADD ADDRESS](#)

Consent Options



I am happy for my data to be stored on this database
Edited Amy Da Costa, 11 Aug 20, Consent check at event registration (Network)



I am happy to receive email communications from the Toucan
Community
Edited Amy Da Costa, 11 Aug 20, Consent check at event registration (Network)



I'm happy to receive occasional fundraising updates by email
Edited Amy Da Costa, 17 Apr 20, Consent check form (Network)



I am happy to get the Toucan Magazine by email
Edited Amy Da Costa, 06 Jul 20, Online profile (Network)

Name

Title: Mrs
First name: Amy
Last name: Da Costa
Preferred first name:
Middle name:
Previous Last Name : [Delahunty](#)
Suffix 1:
Suffix 2:

Updated on 09 Jun 2020 by Amy Da Costa (Delahunty)



Postal labels

Group type: Family
Envelope label: Miss Amy Delahunty
123 London Road
London
LD21 4ON
United Kingdom
Letter salutation: Miss Delahunty
Others in this group : Amy Da Costa (Delahunty) , Sian Morley , Kate Edwards , Michaela Ubaldo

Group type: Family
Envelope label:
Letter salutation: The Da Costas
Others in this group : Amy Da Costa (Delahunty) , Sian Jones (Fleming-Jones)

Group type: Individual
Envelope label: Mrs S and Da Costa
123 London Road
London
LD21 4ON
United Kingdom
Letter salutation: Sian Morley-Smith and Amy Da Costa
Others in this group : Amy Da Costa (Delahunty)

Group type: Family
Envelope label: Mrs S and Da Costa
Letter salutation: Mrs Morley-Smith and Miss Da Costa

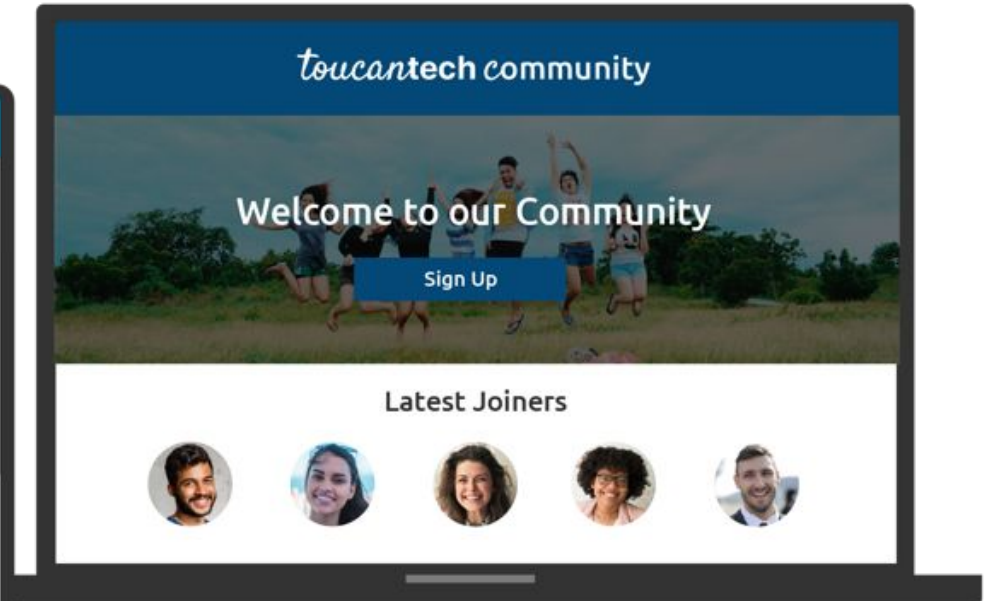
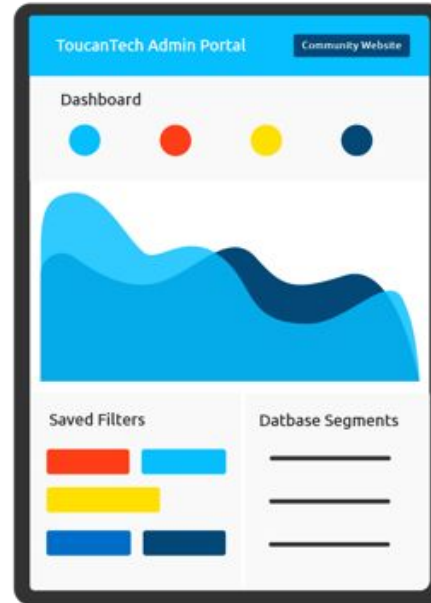
Keep it going – don't stop at 100 days!

- Keep going with those cleaning protocols – they pay off
- Thinking about doing a survey or telephone appeal? When writing the questions, consider where that data is going to go
- Processes change: make individuals responsible for reviewing and adapting every process guide



About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



Any questions?

Please contact Amy – amy@toucantech.com
www.toucantech.com

