



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....”