

# Fundraising Reporting Challenges



## The Client

A large metropolitan Jewish Federation receives more than \$24,000,000 in annual contributions each year and has a database of over 50,000 donors and prospects. Over the last year, this Federation invested in state of the art donor and financial applications to manage fundraising and donor data, as well as major investments in staff and training.

## The Challenge

The Federation's multiple databases (ex: GiftTraq) all stored critical pieces of fundraising, donor and financial information, but the databases could not connect and communicate with each other. Existing reporting was not user-friendly, required hours of training, and was unable to support the report volume required by staff, management and Board Members. Custom report development and distribution was time consuming, expensive and inefficient. The volume of data created by the multiple systems meant duplicated contacts, processes and data.



## The Solution

### Step 1: Assessment

The Service First team worked to document the existing processes, applications and technologies. This process analyzed all aspects of the organization including pledge documentation, data entry, data maintenance and other critical components of the Fundraising Operations. Service First evaluated all applications containing critical information and identified any points of integration.

### Step 2: Data Management

After a detailed assessment, Service First created a data warehouse to better protect and manage the Federation's crucial donor and fundraising information. GiftTraq data was merged with existing donor contacts, creating an accurate and consolidated store of all fundraising and donor information.

### Step 3: Custom Reporting

A second phase of analysis included the review of and recommendation on the types of reports required to manage the fundraising program. Our team created custom report templates that allowed client staff to generate new reports with speed and confidence. Service First also created links to the most commonly used reports on the Federation's intranet and website, with security controls that limit access to appropriate staff.

### Step 4: Maintenance

The Service First team remains dedicated to assist internal staff with technology upgrades, software updates and changing reporting needs.

## The Results

Board Members and staff can create custom reports, based on evolving requirements, timely with minimal effort. Reports can be targeted to a specific audience, allowing Federation staff, Board members and/or the general public to access the required information via the organization's website or intranet. All this information is now available in the form of real-time, accurate data; placing time and improved decision-making power in the hands of the fundraising team.

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