Bold Play 2: Individual Donor Data Collection in the Workplace

Toolkit
Individual Donor Data Collection Introduction

Goal: This toolkit includes a consolidated set of resources that will strengthen your ability to collect donor data in the workplace and, as a result, engage individual workplace donors more successfully, particularly if they retire or leave that workplace. We encourage you to share your experiences with us so we can better fine-tune these materials by commenting on this tool on United Way Online on the landing page for this resource.

What’s Included:

1. What to Collect: Critical Data Elements
2. How to Collect: Materials for Donor Data Collection
3. Main Talking Points for Releasing Donor Data
4. Staff Roles
5. Third Party Processors – Tips and Examples
6. Tips from Local United Ways
7. Case Studies from the Network
8. Success Measures
9. What Comes Next?
Toolkit Components:

- **What to Collect**
- **How to Collect**
- **Main Talking Points**
- **Staff Roles**
- **Case Studies From the Network**
- **Tips From The Network**
- **Third Party Processors**
- **Success Measures**

**Next Steps:** Employee Engagement
What to Collect: Critical Data Elements

The first thing you need to know to start successfully collecting workplace donor data is what data is actually important to collect! Included to the right is the United Way recommended donor data wish list. The data included here can be captured on pledge cards, through workplace events, or through a direct ask to the individual donor.

This tool, as well as other useful resources, can be viewed in the Data Audit Toolkit by clicking here.

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<tr>
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<th>Recommended Data Wish List</th>
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<td>Name (Prefix, First, Middle, Last, Suffix)</td>
</tr>
<tr>
<td>2</td>
<td>Preferred Name</td>
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<td>3</td>
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<td>Philanthropic Areas of Interest</td>
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<td>15</td>
<td>Engagement History (volunteer history/activities/tendencies/events)</td>
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How to Collect: Materials for Donor Data Collection

1. Effective Pledge Cards
   Click here to see United Way of Massachusetts Bay and Merrimack Valley’s General Pledge Form

2. Text messages, surveys, event sign-in sheets are great ways to ask for and capture personal contact information

3. The “Top 25 Reasons” sheet can help make the case to donors for giving United Way personal contact information and can be handed out, used at events as a table tent, or as a “paycheck stuffer”

4. E-mail Communications
   • Click here for an adaptable e-mail message that will help you ask workplace donors for their personal e-mail addresses
Talking Points for Releasing Donor Data

These talking points were developed from conversations with local United Ways who have had success in collecting donor data. They can be used in conversations with Employee Campaign Coordinators, Payroll contacts, and, if appropriate, in CEO conversations.

Talking Points:
1. Donor data can increase a company’s ability to recruit and retain employees
   a) Employees who feel like they are making a difference through their workplace are more likely to stay there longer and be happier in their positions
   b) With donor data we can place donors into affinity groups and offer them volunteer opportunities and invite them to special events that will contribute to their professional development.
   c) Donor data allows us to inform workplace donors about the impact their gift has had and provide other forms of year-round engagement and relationship building that will increase their engagement both with United Way and the employer that made our connection possible
Main Talking Points Continued…..

2. Donor data allows United Way to **acknowledge gifts and thank donors**
   a) A survey from the [Retention Toolkit](#) shows that 92% of participants in a survey said acknowledgement that a gift was received is critically important
   b) 46% of donors stop giving due to charities’ failures to communicate
   c) 70% of donors would probably or definitely increase their overall philanthropic giving if charities improved their quality of communication

3. Donor data allows United Way to **recognize donors uniquely**
   a) Through our Leadership and Tocqueville Giving levels and the United Way Loyal Contributor program, if United Ways have donor data, they can personally recognize donors based on their unique gifts.
   b) Donor data that includes spouse and significant other name can also allow donors to combine gifts and reach a Leadership Giving or Tocqueville level
Main Talking Points Continued…

4. Donor data allows us to connect with donors individually and **give them the type of philanthropic experience that they want to have**

5. Donor data ensures **accuracy and efficiency** of campaign processing
   a) One of the most common problems seen during the campaign by United Ways who do **not** have access to donor data is that employees feel like they have been thanked for the improper amount or do not feel confident that their designation made it to the appropriate agency
   b) Donor data enables United Ways to ensure accuracy of processing and thank and inform donors specifically and accurately, thus increasing trust for United Way and the promised impact of workplace giving
Staff Roles

The ability to operate and collaborate cross-functionally is critically important to successful donor data practices. All teams across a United Way should plug in to this effort to support United Way’s success.

1. **Resource Development staff** should be at the forefront of this effort. They have relationships with corporate partners and fundraising skills that will enable them to make the case for donor data and maintain a working relationship with the corporate partner, giving United Way the chance to influence campaign operation. Resource Development staff can also equip volunteers to make the ask and make the case for donor data on behalf of United Way.

2. **Marketing and Communications staff** can contribute by creating promotional materials for corporate partners that highlight the case for donor data, recognition materials for donors, and also materials for donors that makes the case for giving United Way their personal contact information.

3. **The Finance team** also plays a critical role in this effort and should be in ongoing communication with Resource Development Staff. Finance’s understanding of the ins and outs of campaign processing can help inform Resource Development’s conversations with corporate partners by helping RD staff understand what data is needed, where they are succeeding, where they need to focus their support, etc. The Finance team’s data entry practices are also critical to this work, and commitment to exhaustive donor data entry can make all the difference in United Way’s ability to connect with individuals. Finance can also proactively capture information and help identify gaps in data.
Increasing popularity of third party processing has made attaining donor data in a timely manner, or at all, a challenge. Using examples provided by local United Ways, here are some tips on how to work with your corporate partner to receive donor data.

**Tips**

- Always be tactful, but **keep asking for donor data and clearly share the value of donor data release**
- Offer to process campaigns internally or **refer processing to other United Ways who may have more capacity**
- Expertly convey the purposes of donor data collection, **reassure corporate partners that donor data will never be sold or used for outside solicitation**
- **Coordinate with other United Ways in corporate partners’ strategic markets to strengthen position and ensure message makes it to the decision-maker**
- Make it a priority to **be the best relationship managers possible**

**Examples**

- Click here to read what Heart of Florida United Way is doing regarding third party processors
- Click here to read what United Way of East Central Iowa is doing regarding third party processors

**Helpful Resource:**

Campaign Growth & Efficiency Committee Updates
Tips from Your Local United Way Colleagues

- Train staff and volunteers on the importance of donor data and how to convey the value to corporate partners.

- Recognize a corporate partner’s strategic goals around social responsibility and find ways to align United Way’s work with those goals, use this as a springboard to discuss the importance of donor data.

- Engage in year-round relationship building with corporate partners, starting at the C-Suite!

- Apply a cross-functional approach to this effort (see staff roles above).

- Work together with other United Ways to gain insight, represent interests collectively, etc. Function as a network!

- Don’t be afraid to ask and come back to the issue.

- Look for opportunities to highlight the importance of donor data and United Way’s processing preferences.

- Provide an employee engagement plan or menu to corporate partners, see template here.

- Look for internal champions for your cause who can help drive your message.

- Once donor data is secured, be careful not to over-solicit donors. Use diligent data entry techniques to ensure that communications go to appropriate recipients at the appropriate times.

- Have healthy expectations, set attainable goals related to donor data for this campaign season, then evaluate and begin again with a new goal in mind.

- Implement an “opt-out” policy for donor data collection in your corporate partnership agreements. To read more about an opt-out policy, click here.
Case Studies from the Network

• Click here to read about Mile High United Way’s Corporate Partnership Profile and how it helped them make the case for donor data release

• Click here to read how Greater Ottawa County United Way has incentivized corporate partners to provide donor data

• Click here to read how Valley of the Sun United Way has made the case for donor data release
Measures of Success

Once you begin to implement new practices related to donor data collection, look to these markers as a starting place to measure your progress.

1. Increase in **number of personal e-mail addresses** and contact information

2. Increase in number of **corporate partners providing donor data and allowing United Way to contact employees**

3. By using data to communicate and engage individuals around their interests, you should ultimately expect **increased campaign and undesignated funds (RUM) results**

4. Increase in **internal understanding of the importance of donor data**

5. Increased awareness of **individuals’ interests and philanthropic priorities**
What Comes Next?

As you become more successful in collecting donor data, specifically personal donor data on workplace givers, your United Way’s ability to engage with donors and develop relationships with the community will grow exponentially. Next, use your newly acquired donor data to do the following:

1. **Talk to employees to understand their needs and interest areas**

2. **Understand your target individual donor** (read about this in an excerpt from the 2015 Individual Experience Report by clicking here).

3. **Engage your Employees around their Interests**
   a) Match employee engagement experiences to employee interests
   b) Develop year-round communications plan to share United Way’s work and the results of donors’ philanthropy
   c) Provide volunteer opportunities tailored to company’s and their employee’s interests
We want to hear about your experiences related to individual donor data collection. If you have a story to share or any questions or comments, please contact: Edwin Goutier (edwin.goutier@uww.unitedway.org)