

**EFFECTIVE DONOR RELATIONS:  
A CROSSROADS BETWEEN  
STEWARDSHIP AND TECHNOLOGY**

Presented by:  
Mary Carole Starke, Associate VP for Operations, Vassar College  
Perry Liberty, Associate Director of Donor Relations, Vassar College

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### Agenda

- Purpose of this Session
- Examples of the Intersection between Stewardship and Technology
  - Acknowledgements
  - Recognition Database
  - Endowment Database
  - Scholarship Maintenance System
- Trends Discussion
- Questions

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### Purpose of this Session

- Discuss the need for reliable, accurate and timely data in the stewardship process
- Standardization vs. Customization
- Discuss the relationship between stewardship and technology
- Using data and technology to effectively steward donors
- Examples of tools and technology used to manage data

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ACKNOWLEDGEMENTS

SQL, Banner, Hyperion, FileMaker

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Acknowledgement Process

- Vassar standards for acknowledgements
- Standardization vs. Customization
- Reporting
- Integration



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Tools

- SQL
- Datatel + SGHE  
Banner Advancement
- Hyperion Brio
- FileMaker



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### SQL Sample

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if @listOfValues is null or '' then
    select * from [dbo].[tblGift] where 1=0
else
    select * from [dbo].[tblGift]
    where [GiftCode] in ('APADM', 'APADM', 'APADM', 'APADM', 'APADM', 'APADM', 'APADM', 'APADM', 'APADM', 'APADM',
                        'APADM', 'APADM', 'APADM', 'APADM', 'APADM')
end if
if @year is null or '' then
    select * from [dbo].[tblGift]
    where 1=0
else
    select * from [dbo].[tblGift]
    where [Year] = @year
end if
if @donorCode is null or '' then
    select * from [dbo].[tblGift]
    where 1=0
else
    select * from [dbo].[tblGift]
    where [DonorCode] = @donorCode
end if
if @formCode is null or '' then
    select * from [dbo].[tblGift]
    where 1=0
else
    select * from [dbo].[tblGift]
    where [FormCode] = @formCode
end if

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- ### Banner data
- ▣ Address information
  - ▣ Salutations
  - ▣ Gift and Pledge data – current and historical
  - ▣ Recent contacts and previous correspondence
  - ▣ Event attendance
  - ▣ Activities and volunteer positions
  - ▣ Consistent and Consecutive giving
  - ▣ Prospect ratings
  - ▣ Summary of lifetime giving

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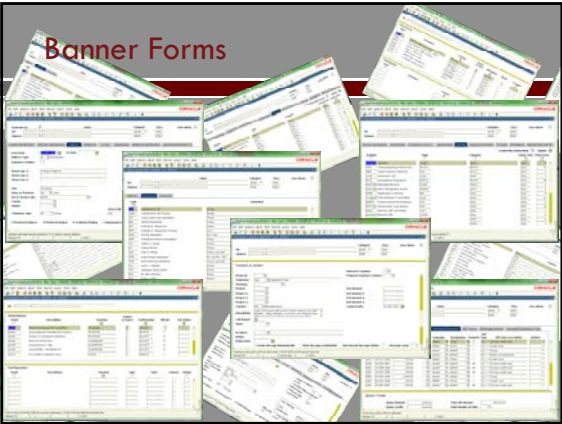
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# Acknowledgement Report

Current Listing of All Entry Fees Between 03/01/11 and 03/31/11  
 Student College Contributions

Report: A & A Business Source  
 Dates: 03/01/11 - 03/31/11  
 Period: Payment  
 Order: ASC

Student	Account No.	Product	Rate	Balance	Due Date	Payment	Interest	Penalty	Total
James M. A. Business Source	1000	Business Source	1000	1000	03/01/11				1000
John Doe	1001	Business Source	1000	1000	03/01/11				1000
...	...	...	...	...	...	...	...	...	...

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 Period: Payment  
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James M. A. Business Source	1000	Business Source	1000	1000	03/01/11				1000
John Doe	1001	Business Source	1000	1000	03/01/11				1000
...	...	...	...	...	...	...	...	...	...

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# Acknowledgement Report

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James M. A. Business Source	1000	Business Source	1000	1000	03/01/11				1000
John Doe	1001	Business Source	1000	1000	03/01/11				1000
...	...	...	...	...	...	...	...	...	...

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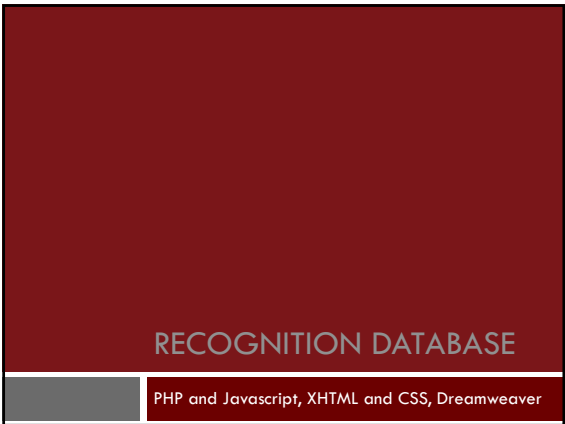
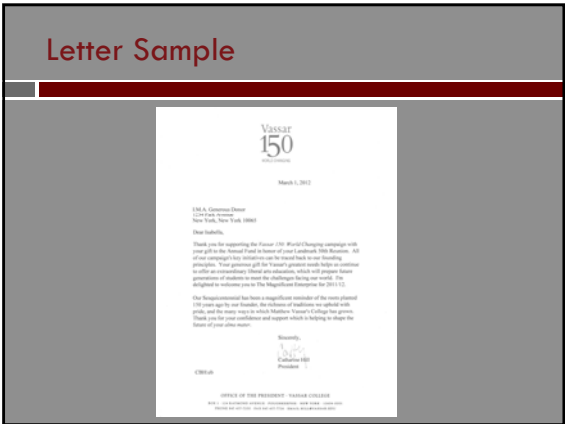
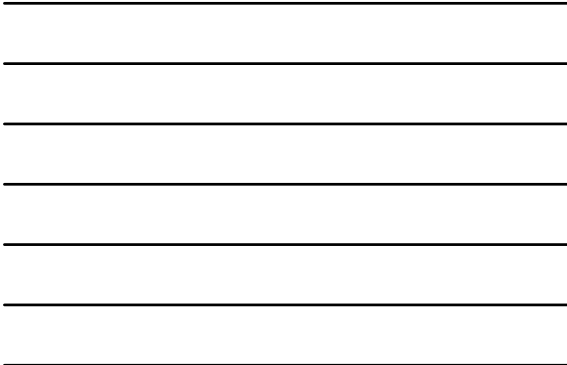
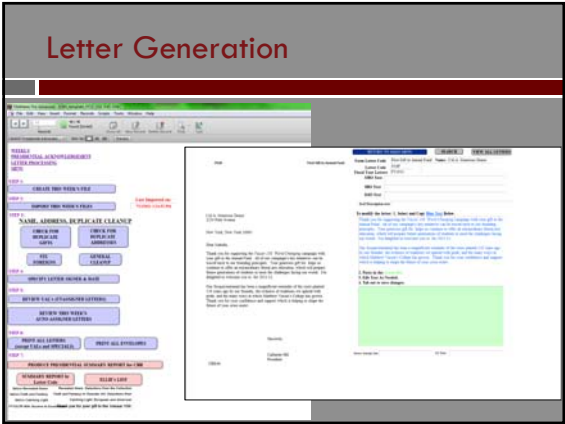
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### "Product" Development

- Needs
- Decision making process
- Interface with Gift Opportunities Database



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### Tools

- Banner
- PHP and Javascript
- XHTML and CSS
- Adobe Dreamweaver



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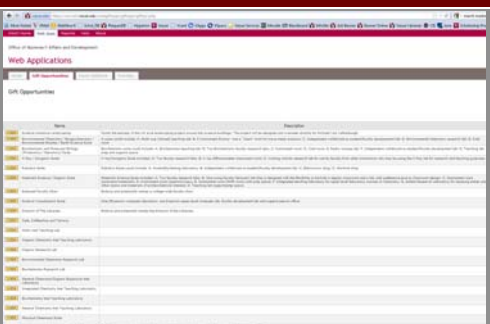
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### Gift Opportunities



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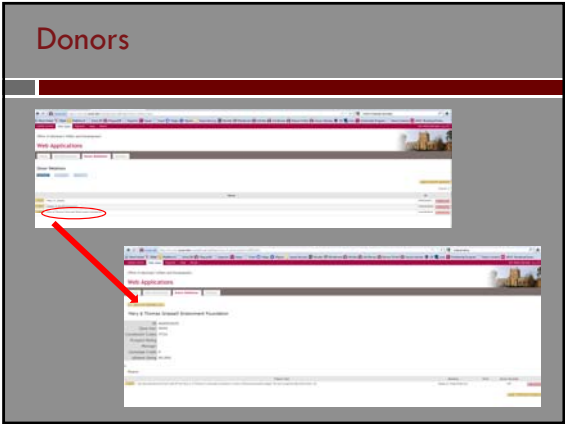
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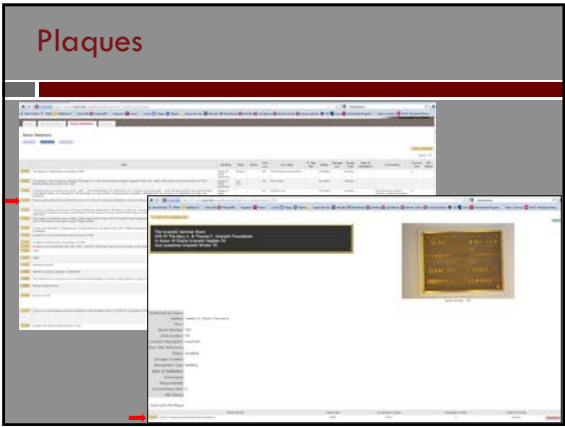
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### “Product” Development

- Needs
- Decision making process
- Integration with Banner
  - ▣ Updates individual records in the Endowment database
- Future enhancements
  - ▣ Integration with Banner Endowment module

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### Tools

- Banner
- FileMaker



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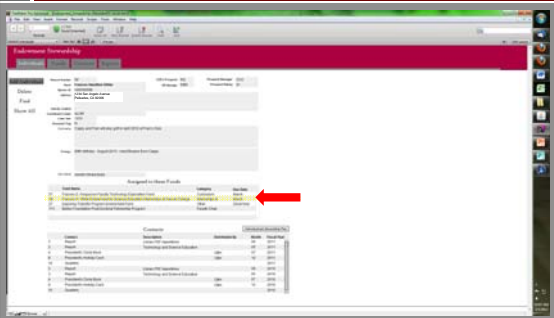
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### Individuals



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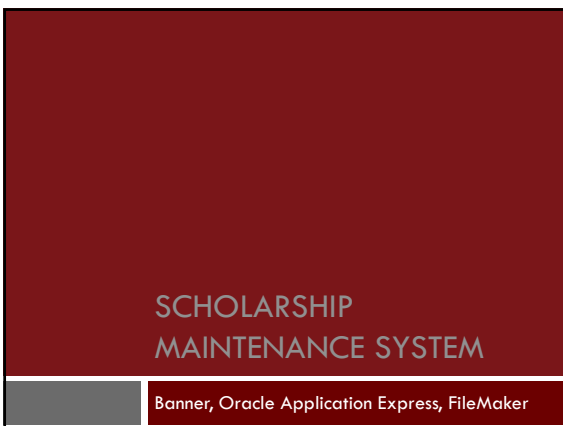
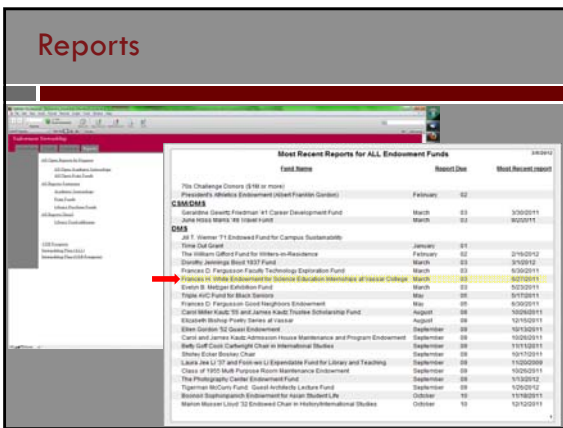
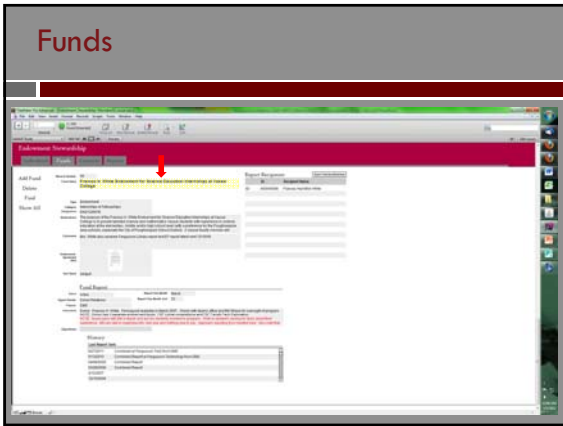
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### “Product” Development

- Needs
- Decision making process
- Integration of multiple databases
- Future Enhancements
  - Integration with Banner Finance module

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### Tools

- Banner
- Oracle Application Express
- FileMaker



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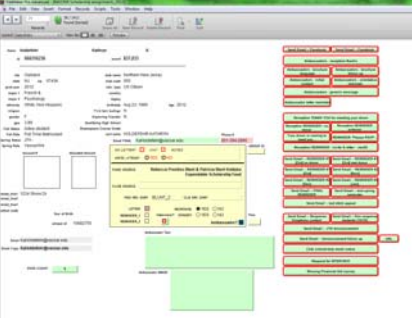
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### FileMaker – scholarship assignments



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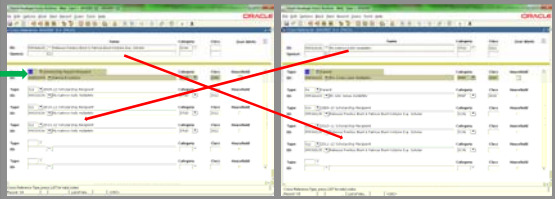
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### Banner Forms



The screenshot shows two windows from the Banner Forms application. The left window displays a list of forms with columns for Name, Category, and Date. The right window shows a detailed view of a form. Red 'X' marks are drawn over both windows, indicating they are not to be used or are obsolete.

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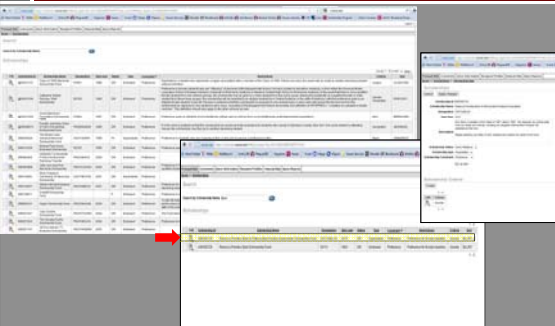
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### Principal Data



The screenshot displays the Principal Data interface, which includes a large data table with multiple columns. A pop-up window is open in the foreground, showing a form with various fields and buttons. A red arrow points to a specific field in the table.

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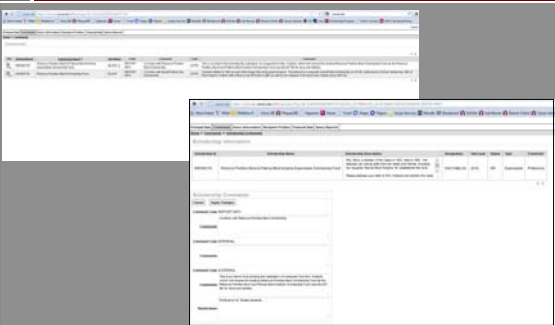
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### Comments



The screenshot shows the Comments interface, featuring a form with a large text area for entering comments. There are several buttons and labels around the text area, including 'Add Comment' and 'Cancel'.

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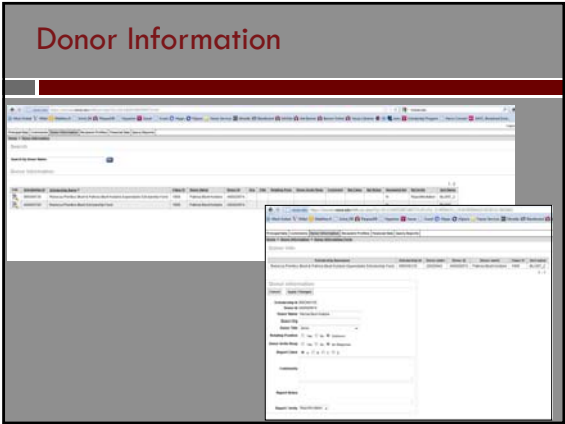
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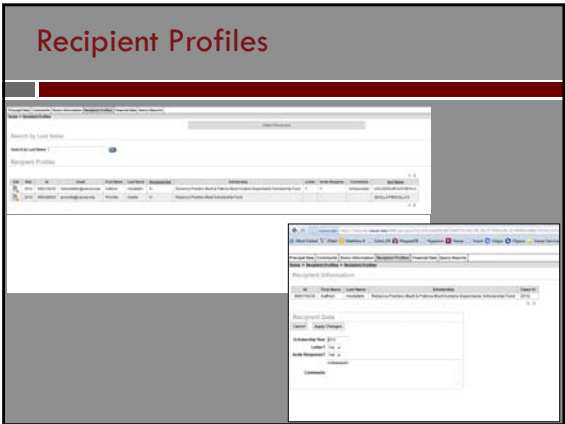
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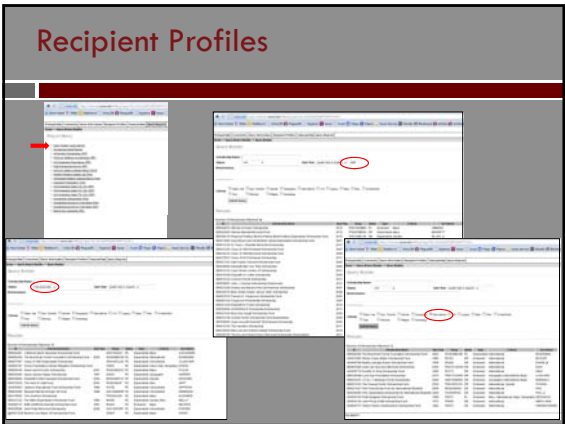
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### Recipient Profiles

This screenshot shows a software interface with a sidebar on the left and a main content area. A red arrow points to a list of items in the sidebar. In the main area, there are several overlapping windows. One window shows a list of names and dates. Another window shows a detailed profile for a specific recipient, with red boxes highlighting certain fields. A third window shows a table of data with columns for various attributes.

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### Recipient Profiles

This screenshot is similar to the one above, showing the same software interface. A red arrow points to the sidebar. The main content area shows a different set of overlapping windows. One window shows a detailed profile with a red circle around a specific field. Another window shows a table of data. A third window shows a list of names and dates.

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### TRENDS DISCUSSION AND QUESTIONS

Q & A

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# Thank you!

**Mary Carole Starke**  
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