

The Role of Data Manager

A Data Manager is a person who understands the many intricacies of data as it relates to its use to raise dollars for a charity. They understand the needs of the fund development department and ensure that data entered meets today's requirements as well as those in the future.

A data manager will monitor the quality of the data found on the donor database. Everything from ensuring:

- naming standards are maintained
- searching out duplicate entry and
- confirming address standards are adhered to.

A data manager will educate staff members where staff work is non-compliant. Where work is unsatisfactory, the data manager will take steps to correct the data.

Data will be reviewed to ensure duplicate entries do not exist, that donors who no longer have valid contact information are recorded for Exclusion, that contacts are included and that the key contact for corporate records is the person of best choice.

The Data Manager will create the Campaigns necessary to adequately record gifts. They will create campaigns using consistent standards and where a campaign runs from year to year, use previous standards to maintain consistency. Areas to be considered for all campaigns include ... Donation Type, Letter Field, Accounting Fund, Charitable status, Receipting status, On-going and Yearly status for pledges.

Designated funds need to be defined and there will be NO Designated Donation Campaign.

The Data Manager will know how to record annual sponsorships so that commitments are not dropped or lost.

A data manager will know the best way to enter specific types of donations to present maximum benefit to the organization as well as the donor. A data manager will monitor all gift entry to ensure it meets the standards of the charity.

- Pledges
 - Memoriams
 - In Honour of
 - Special Events
 - Tickets
 - Registrations
 - Sponsors
 - Auction donations
 - Auction purchases
 - Cash sale revenue items
 - Third Party events
 - Gifts in Kind (not including auction donations)
 - Grants
- ✓ Which fields are to be used and what the benefits are for reporting.

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- ✓ Charitable or non-charitable status - CRA rules governing gifts
- ✓ Naming Standards
- ✓ Proper Spelling

A data manager will assist creating standards for the capture of research information and its storage in the database.

A data manager will ensure that when a company or private individual is entered that all known web and social networking activity is recorded.

A data manager will be able to assist in what reports are available and how to extract them.

A data manager will be able to extract data for letters and other interactions including being knowledgeable regarding use of the letter field when merging.

A data manager will assist with the development of custom tables used to describe campaign and donor characteristics so that they are meaningful and not redundant.

A data manager can manage electronic tools to prevent disorganization and enable access to letter formats, sponsorship packages and more with immediacy.

The use of a contact manager will be employed by departments so that all actions with a donor can be reviewed.

Contact information will be maintained in the database and updated to email contact lists.

The role of Data Manager is very important to the health of the charity and its ability to work effectively with its donors. Quality work standards enable a charity to mine its data which supports financial growth.

Batsch Group specializes in Data Management. For more information on how you can define a Data Management Strategy for your organization, contact us at one of the numbers below.