



Board & Donor Advancement

SE CENTRAL REGION

Database Spring Cleaning

As the spring season approaches, it is a great time to conduct basic donor database maintenance and care. A healthy donor database ensures we communicate effectively, steward donors well, and maintain accurate records that support ministry growth.

Key Database Actions

Verify Donor Contact Information

Review donor records to ensure contact details are accurate
Confirm primary email, phone number, and mailing address
Verify the correct primary contact if the profile represents a couple or business

Remove Duplicate Records

Search for duplicate donor profiles
Merge or remove duplicates to maintain a single accurate record

Review Giving History

Identify each donor's first gift date and original gift amount
Note key anniversaries or milestones in your calendar
Schedule annual touchpoints tied to their giving history

Review Communication History

Ensure past emails, calls, meetings, and notes are documented

Identify Donor Care Opportunities

Identify donors you have not spoken with recently
Reconnect through calls, handwritten notes, coffee meetings, or ministry updates

Capture Donor Preferences

Add notes about preferred communication methods (email, phone, text, mail)
Record preferred giving methods (online, check, donor advised fund, etc.)

Add Social Media Connections

Add LinkedIn, Facebook, or other relevant profiles for relational context

Identify Inactive Donors

Run reports for donors who have not given in the last 12–24 months
Create a re-engagement strategy to reconnect and share ministry impact

Important Reminder

Our donor database is only as good as we maintain it. Incorrect or outdated information can damage relationships and undermine trust with our supporters. Taking intentional time each year to review and update donor records helps ensure we honor donors with excellence and accuracy.