



The monthly feature focus highlights the capabilities and usefulness of a specific aspect of FUNDimensions. It is intended for both current users of FUNDimensions, and for those interested in a close look at how FUNDimensions performs its functions of raising money, providing the information your constituency and management expects, and helping you to communicate the value and importance of a mission.

Pledge Follow-Through

Soliciting donors with fulfilled pledges is a simple but powerful way to raise money, following the adage that it's easier and less expensive to get "repeat business" than to get a "new customer". Most donors will wonder why if they haven't been contacted after their last pledge payment, and they may think your organization is unprofessional if you don't ask them to renew. Or, maybe they'll think you didn't like the color of their money! If you've used the period during their pledge to educate them about your mission and build their confidence in your effectiveness, many donors will be happy to consider a larger commitment.

This process of pledge follow-through is often ignored because the sustained effort of identifying and contacting donors with completed pledges is considerable with many database management systems. With FUNDimensions, it's a simple, largely automated process.

The tasks involved in pledge follow-through are:

- 1 Identify pledges fulfilled in a recent time period; this is usually within the last month.
- 2 Generate a form letter to these donors, thanking them for completing their pledge and asking for a renewal at a higher level.

You should do these tasks on a regular basis. Exactly how often depends on the number of pledges you have and the frequency of payments, but monthly is a common guideline. FUNDimensions contains the tools for all these tasks. Here's how to use them:

Identify Fulfilled Pledges

To identify recently-fulfilled pledges, do this:

- 1 Open the list of pledge records by choosing File>Pledges. This opens a window called the "Pledge List View."
- 2 Open the search dialog by choosing Find>Fulfilled.

- 3 Enter beginning and ending dates in the search dialog. These dates will be compared to the dates on which pledges were completed, and those pledges fulfilled within the date range will be returned as the search results.
- 4 Make sure “Normal” is turned on in the search dialog, then click the Search button. The search results appear in the Pledge List View.

For more information about the Fulfilled search, see the user manual. In the current edition, the information is located in Chapter 10.

Produce Form Letters

To send letters to the donors with fulfilled pledges, do this:

- 1 After completing step 4 above, choose File>Export. The Export Options dialog appears.
- 2 In the Export Options dialog, make sure the “Export pledge with Donor Name and Address (normal mode)” is on. Also turn on “Export records even if Omit Mailing is turned on in the donor record.” For more information on this dialog, see Chapter 7 of the current user manual.
- 3 Click the Export button. Since none of these pledges are overdue, click the button “Don't Include” in the next dialog to omit overdue information from the export.
- 4 In the next dialog, name the export file and click Save.
- 5 Switch to your word processor and perform a mail merge using the export file you just created. You may include language that asks donors to renew at their previous level plus a fixed amount, or at their previous level plus a percentage.

Note for step 5: Most word processors allow for simple calculated field, so that the word processor can calculate the renewal amount request for each donor as either a fixed amount or percentage of their fulfilled pledge, and include that information in the letter. Alternately, it is possible to produce an export from FUNDimensions that includes a amount request for renewal based on the donor's previous pledge. For example, the export could include a field that was 15% more than the amount of the fulfilled pledge. If there are any requests for this type of export, we'll create a template and post it to the web site. Send the request to the support email address.

- 6 Switch back to FUNDimensions and produce mailing labels for the letters by choosing File>Labels. For more information, see Chapter 7 of the current user manual.

Conclusion

The pledge follow-through procedure described here can easily generate enough new revenue to make the effort worth your time and the cost of FUNDimensions.

Comments on this article may be directed to the author, Frank Martin.