



---

## Case Study – Using Donor Management System for Phone-a-thons

Do you utilize phone-a-thons for fundraising? If so, you might be able to use your Donor Management System to streamline the process.

Courtney Goss-Pupkin, Development Director of UMass Hillel holds regular phone-a-thons, leveraging current Hillel students to reach out to potential donors. To manage the process, Courtney prepares an individualized report for each prospect. UMass Hillel, which uses DonorPerfect Online (DPO) for its donor management, uses the "Info Sheet" for this process.

The Info Sheet details the basic contact information about a prospect in the database, as well as their giving history. This information is used to personalize each call. UMass Hillel also uses the report info to send a pledge follow-up letter to each prospect who agrees to pledge to the fundraising campaign.

Note that the callers do not actually enter any pledge information into DPO themselves. They write the pledge amount on the Info Sheet, sign it, and hand it in for UMass Hillel staff members to enter into DPO. (See below for more information from Laurie Herrick about restricting access to donor/prospect data.)

Once the data is entered into DPO, the "Info Sheets" are shredded to protect the personal information of the prospects.

Although Courtney would prefer that this report was more customizable (it is a standard report in DPO that can be modified without custom programming), UMass Hillel has used it to streamline their phone-a-thon process.

Do you use your donor management system to make any processes more efficient or effective? Tell us about it! We are sure that others can learn from your experiences.