



Next River Fundraising Strategies

Where the science and heart of fundraising converge.

Thank you for trusting Next River Fundraising Strategies with your database audit and historical giving analysis. Our goal is to make this as seamless and expedient as possible - the following information should help you prepare for the audit and answer as many of your questions as possible in advance.

GETTING STARTED

Once you have purchased or confirmed your project, you will receive an email with a link to a secure file transfer location. We take data privacy and security very seriously, and our transfer protocols use the most up-to-date and secure processes available. This file location is unique to you and cannot be accessed by anyone else.

Due to the nature of data privacy and security, we cannot accept any files transferred via email. Any files transferred by email will be destroyed and you may be charged additional data handling and processing fees.

FILE FORMAT

The database audits and giving analysis are run on a secure and private analysis platform. It does require the input file to be in a specific layout and transferred in .csv format. We have verified that the required fields are standard in most fundraising CRMs, although they may use different names (e.g. "most recent gift" vs. "last gift", etc).

The required format can be downloaded from www.nextriverfundraising.com/audits. A list of required fields is also attached to this document.

Please ensure you submit your file using field names on the 2nd tab of the file format layout.

This file format allows us to process the file quickly and efficiently; if your file does not meet the required format, it will be rejected and may incur additional data processing charges.

Note: If you set up your report/export from your CRM in the same order as the file layout, then all you would need to do would be to copy the header from the 2nd tab of the worksheet, make any edits and save as .csv.

TIMING

Your audit report will be processed as soon as the final file is received and the format is confirmed. You should anticipate receiving your report within 7-10 business days from the time you deliver the final audit file.

Proven Strategy. Systems that Work. Stories that Inspire.

www.nextriverfundraising.com



ADDITIONAL REPORTS

Your audit report will be processed as soon as the final file is received and the format is confirmed. You should anticipate receiving your report within 7-10 business days from the time you deliver the final audit file.

If your audit includes the additional hygiene and financial impact report, we will be in touch with you to determine arrangements as this is conducted with via our data partner. We recommend doing those two reports in advance of the audit, but will work with you to determine the best process.

AFTER THE AUDIT

Once your audit report is delivered, please review it for accuracy or issues; while our auditing system is extremely precise and egregious errors are unlikely, there is always a chance that data may be misinterpreted or misaligned. We will, of course, fix any errors that may have occurred on our end.

If your audit includes additional coaching or consulting hours, we will include scheduling information when sending the report. If you would like to add any additional time with us to review the report, please email us at hello@nextriverfundraising.com

DATA FIELDS

The following page contains a list of required and recommended fields for the audit report.

- For the giving history analysis you may choose either 5 years or 10 years of giving history (we recommend 10 years which may seem like a long time but really helps to point out key trends, longevity, and loyalty.)
- Any required fields that are not provided will result in errors on the report.
- The input file must be in this order and provided in .csv format. A template will be emailed to you or you may download one from www.nextriverfundraising.com/audits.
- You may choose to audit your entire file or a specific segment
- There is currently no limit on the number of records, however the larger the file, the longer the report will take
- We recommend applying soft credits to the recipient vs. the actual donor (e.g. the individual vs. their company making a gift on their behalf)
- For a true representation of trends, you may wish to remove any outliers such as extremely large gifts, in-kind gifts valued at \$0.00. The report does not have the ability to distinguish between unrestricted vs. restricted giving and therefore may show giving trends related to specific fundraising efforts, capital campaigns, etc.

REQUIRED DATA FIELDS

FIELD NAME	NOTES
Constituent ID	Unique Identifier
Full Name	
Organization Name	
First Name	
Middle Name	
Last Name	
Record/Constituent Type	e.g. Individual, Organization, Foundation, etc.
Salutation	
Addressee/Envelope Name	
Spouse-First	
Spouse-Middle	
Spouse-Last	
Phone Number	
Work Phone	
Mobile Phone	
Email	
Email 2	
Address	
Address 2	
City	
State	
Zip	
Deceased	Flag or Y/N (If unavailable, leave blank)
First Gift Date	Date of First Gift
First Gift Amount	Amount of First Gift
Second Gift Date	Date of Second Gift
Second Gift Amount	Amount of Second Gift
Last Gift Date	Most Recent Gift Date
Last Gift Amount	Most Recent Gift Amount
Largest Gift Date	Date of largest single gift
Largest Gift Amount	Amount of largest single gift
Lifetime Gift Amount	Total amount of giving per donor (e.g. lifetime on file)
Lifetime # of Gifts	Total number of gifts made per donor
Lifetime # of Years Giving	Total number of years donor has been giving
FY1 Total Amount	FY1 is most recent with FY5 being the oldest
FY1 # of Gifts	Include definition of fiscal year e.g. "FY1 = 7/1/2023 - 6/30/2024", etc.
FY2 Total Amount	Do not include current, partial, or incomplete years.
FY2 # of Gifts	
FY3 Total Amount	
FY3 # of Gifts	
FY4 Total Amount	
FY4 # of Gifts	
FY5 Total Amount	
FY5 # of Gifts	
FY6 Total Amount	
FY6 # of Gifts	
FY7 Total Amount	
FY7 # of Gifts	
FY8 Total Amount	
FY8 # of Gifts	
FY9 Total Amount	
FY9 # of Gifts	
FY10 Total Amount	
FY10 # of Gifts	

REQUIRED FIELD

RECOMMENDED