Colonial Heritage Foundation

EXECUTIVE SUMMARY

Colonial Heritage Foundation (http://colonialheritage.org) is a recently established 501(c)(3) with the goal of preserving the history of America's founding. They engage in a variety of activities such as presenting at schools, coordinating reading groups and historical reenactments, and teaching the occupational skills of early America through internships and apprenticeships. The foundation is positioned to launch fundraising initiatives to expand their reach. This project was a coordinated effort to help design a skeleton database and create sample forms to be used for volunteers to be able to interact with and update the database.

Oertel Sparks
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MBA 614 – Winter 2014

BYU | MBA

VBA FINAL PROJECT REPORT

Organization

Colonial Heritage Foundation is a 501(c)(3) with the goal of preserving the history of America's founding. They engage in a variety of activities such as presenting at schools, coordinating reading groups and historical reenactments, and teaching the occupational skills of early America through internships and apprenticeships. The legal name of the foundation is the Society for the Preservation of America's Founding Values, Inc.

The Foundation sponsors the Colonial Heritage Festival, a historical reenactment in Orem, Utah, as well as presentations by individual reenactors, lectures, and presentations. The Foundation has several traveling exhibits, including replicas of the Mayflower, the Isaiah Thomas Press, and various other artifacts from the early colonial period. In conjunction with its educational exhibits, the Foundation offers unpaid internships intended for students studying Museum Studies or History Education. Individuals selected for the program spend one to three months accompanying educational exhibits to schools, teaching students about Colonial American History and portraying notable figures from the period. Additionally, the Foundation organizes community groups to encourage the reading, understanding, and discussion of America's historical documents.

Problem

With their newly created board, the Foundation is positioned to expand their programming. In order to do this, they need to start coordinating their volunteers, events, and fundraising efforts through the establishment of a database. Most large fundraising organizations pay—sometimes millions—for databases to keep track of prospective donors, volunteers, and other constituents.

Volunteers need to coordinate fund-raising efforts with prospective donors, protect individuals from excessive contact, and make the foundation's work with the community efficient and effective. The foundation needs to install a process for the clearance and cultivation of donors and prospective donors. Key fund-raising opportunities can be sabotaged and lost when this process is ignored or violated.

While this is just the first step toward the creation of a robust fundraising structure, which should grow to include cultivation and stewardship policies, the creation of a database with its coinciding structure to help track relationships and interactions will be essential for the growth and continuation of the Colonial Heritage Foundation.

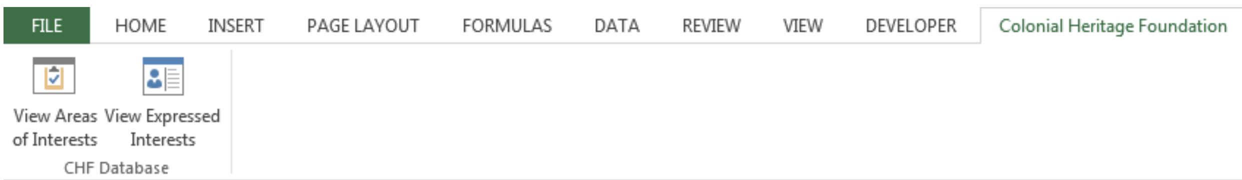
Solution

We met with a board member, a database expert without fundraising experience, to describe how this database should ideally be set up. We determined that for this project we would focus on creating two interactive user forms. These user forms will enable the foundation to track how individuals and organizations feel about the Foundation—for example, if they have a desire to contribute financially, volunteer at one event, or loan replicas. There is both a list of areas of interest and a way to record the times when and areas toward which constituents expressed interest. Part of this database construction process is shown in the Exhibit at the end of this report.

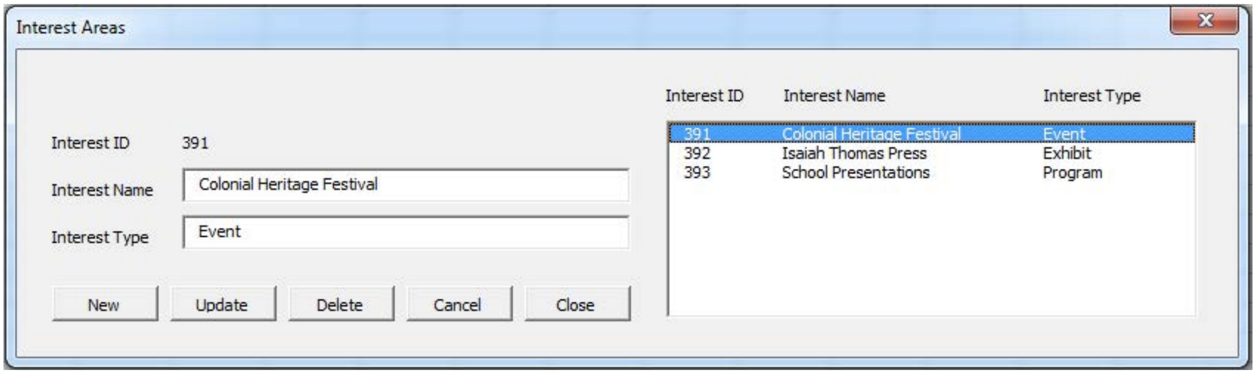
The two forms we were asked to create will record or modify the list of available interest options and allow a Foundation representative to record expressed interest of constituents in the database. These forms will enable the Foundation to have a better sense of their constituents and create plans for future interaction. They will also allow users to update the data via an interface, so they won't have to be experienced database users to keep the information current.

Implementation documentation

This project consisted of two user-forms that are accessing and updating data from a sql database. The two user forms are to update areas of interests and to update expressions of interest. These forms are accessed by opening the excel file, going to the "colonial heritage foundation" tab and selecting either button ('view areas of interest' or 'view expressed interests') These buttons run the macros to initialize the user forms.

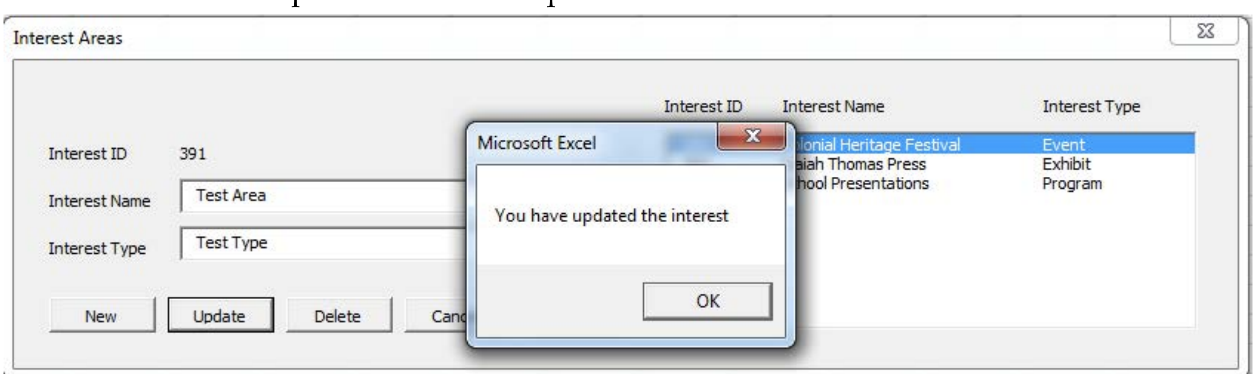


Clicking the 'View Areas of Interests' button opens the following user form:

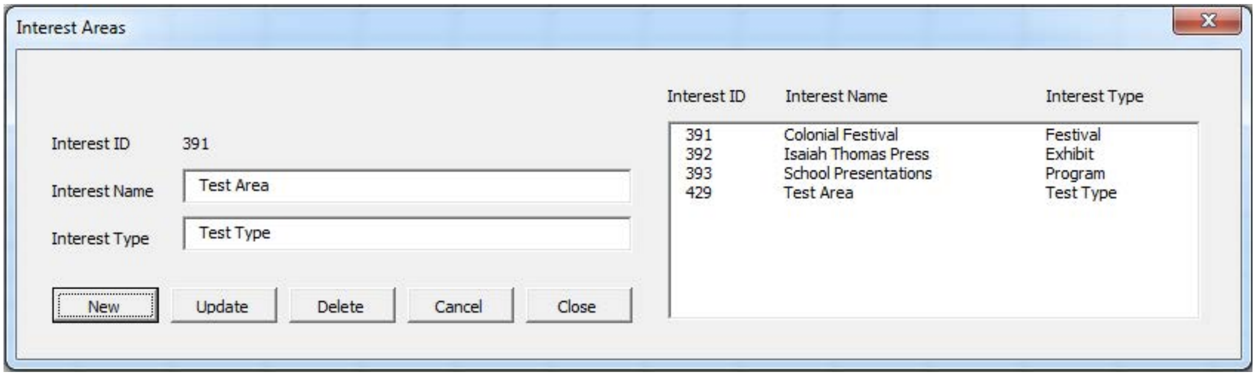


This 'Interest Areas' form allows the user to view, update, create, and delete areas of interests.

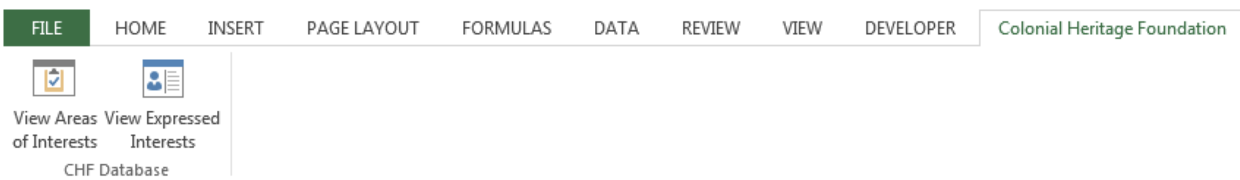
- View: Selecting an entry in the listbox on the right will populate the fields to the left. This data is being pulled from the corresponding table on the sql database.
- Update: When the user enters new values into the text boxes on the left, they can select the 'update' button to update the selected interest area to the list box. This data is then updated onto the sql database



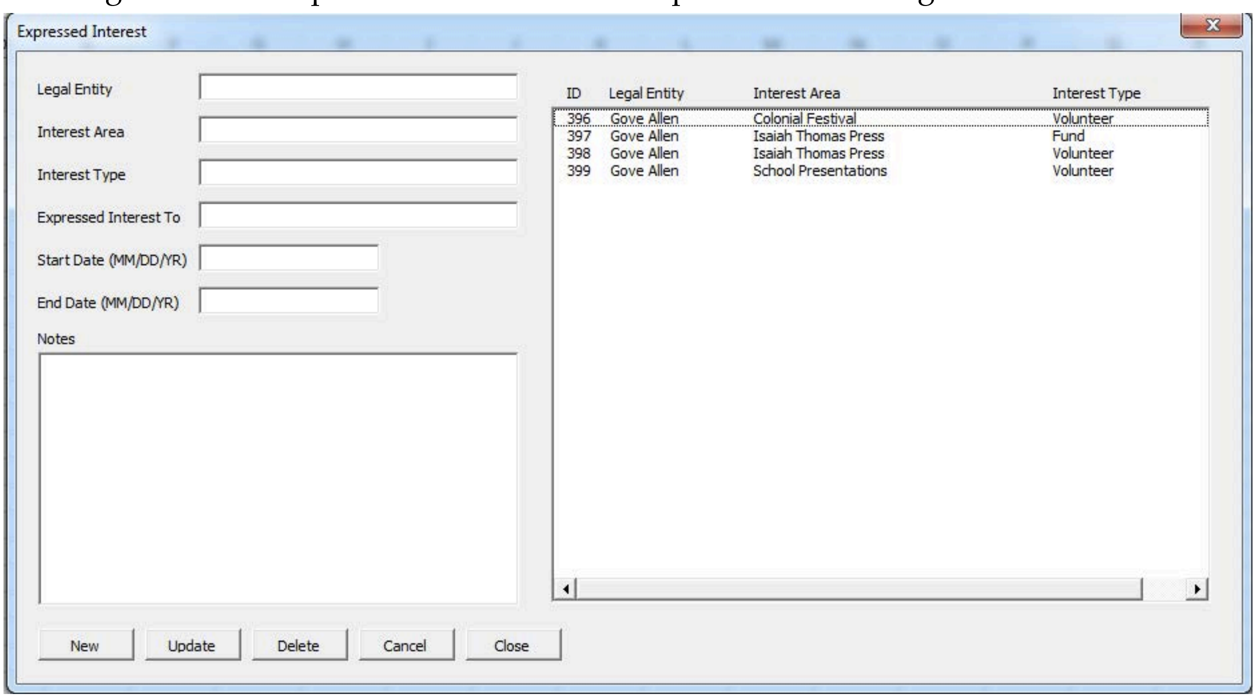
- Create: When the user enters new values into the text boxes on the left, they can select the 'new' button to add the new interest area to the list box. This data is then saved to the database



- Delete: Allows the user selected an entry in the listbox and delete the entry
- Cancel: Clears the form while still keeping it open
- Close: Closes the form



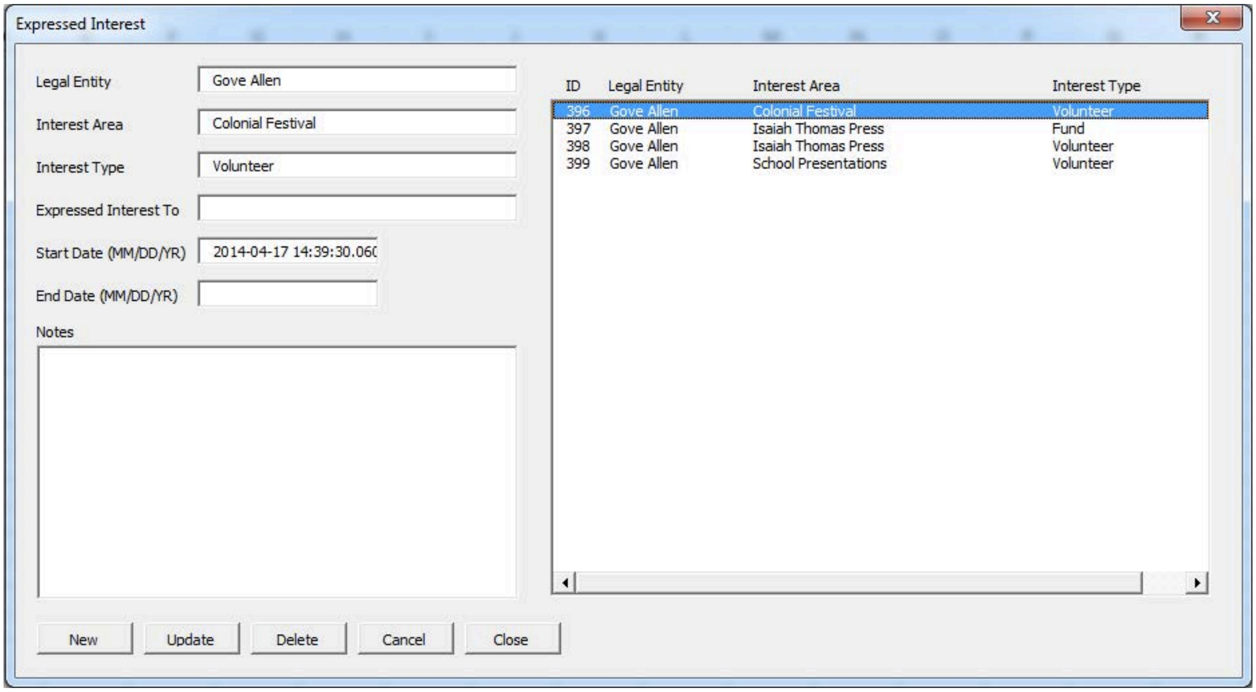
Clicking the 'View Expressed Interest' button opens the following user form:



This 'Expressed Interest' form allows the user to view, update, create, and delete expressions of interest.

- View: Selecting an entry in the listbox on the right will populate the fields to the left. This data is being pulled from the corresponding table on the sql database.

- Update: When the user enters new values into the text boxes on the left, they can select the ‘update’ button to update the selected interest area to the list box



- Create: When the user enters new values into the text boxes on the left, they can select the ‘new’ button to add the new interest area to the list box. This data is then saved to the database
- Cancel: Clears the form while still keeping it open
- Close: Closes the form

Learning and conceptual difficulties

Fundraising databases are generally quite extensive and intricate. We spent a large portion of our time mapping out structure for its creation—which was great and helped us learn quite a bit about database construction, but took most of our time, so we were unable to do as much with VBA code as we would have liked. The actual VBA coding was more difficult that we initially anticipated. This was primarily due to the difficulty of interacting with a database and our lack of exposure to this in the class. We did run into numerous issues on actually creating the user forms but we were happy with what we were able to learn and accomplish. These issues revolved around coding user forms that populated fields from different database tables.

We are excited to see how the Foundation is able to utilize this structure moving forward and hope that it will enable them to continue to put on quality events to enhance our community.

Conceptually, it took quite a bit of time to grasp how the variables would be connected in this database and the most streamlined way to go about doing that. We wish we had more time to further develop this project, as we would like to have been able to automate generation of receipts, thank you letters, cultivation plans, gift forms, etc. We have created quite a few of these resources for the Foundation and, while not included here in interest of focus, will be sharing them with the Foundation along with information on how to streamline their fundraising processes.

Assistance

We received quite a bit of assistance from Professor Gove Allen, who created a skeleton database of individuals, organizations, interests, and interactions for use of the foundation, which we were then able to use to create these two forms. Professor Allen set up the structure for the database and the ability to connect to the database but the creation and building of user forms was done by us.

EXHIBIT: Database Construction Fields

Sample lists used in creation of the database:

DONATION						
Amount of Donation						
Gift to be used for						
	*Solicitation plan					
Unit to benefit						
	Gove to determine (festival, bakery, etc.)					
Prospect Manager						
	*LINK TO VOLUNTEER					
Donation Type						
	Cash					
	Check					
	Credit Card (Visa, MasterCard, Discover, American Express)					
	*collect billing information					
Send receipt to						
	*LINK TO INDIVIDUAL/BUSINESS					
	Donor want to remain anonymous (check box)					
Gifts or services						
	Were any gifts or services providided to the donor					
		If yes, please check what was given and the fair market value				
		Meal	Value			
		Gift	Value			
		Other	Value			
Soft-credit						
	*If any LINK TO INDIVIDUAL					
Pledge						
	Does this gift apply to an existing pledge?					
	*LINK TO PLEDGE					
Matching gift						
	Will donor be submitting a matching gift from his/her employer?					
Notes						
Date Received						
Index Number	*CREATE A LIST OF DIFFERENT PLACES FOR GIFTS TO GO					

GIFT-IN-KIND INFORMATION					
Individual reporting gift					
	*LINK TO VOLUNTEER				
Description of gift					
Gifts or services					
	Were any gifts or services providided to the donor?				
	If yes, please check what was given and the fair market value				
		Meal	Value		
		Gift	Value		
		Other	Value		
Database ID number					
	Date Submitted				
Donor name					
	*LINK TO INDIVIDUAL				
If a corporate gift, is this a company product?					
Donor restrictions on gift					
Comments					

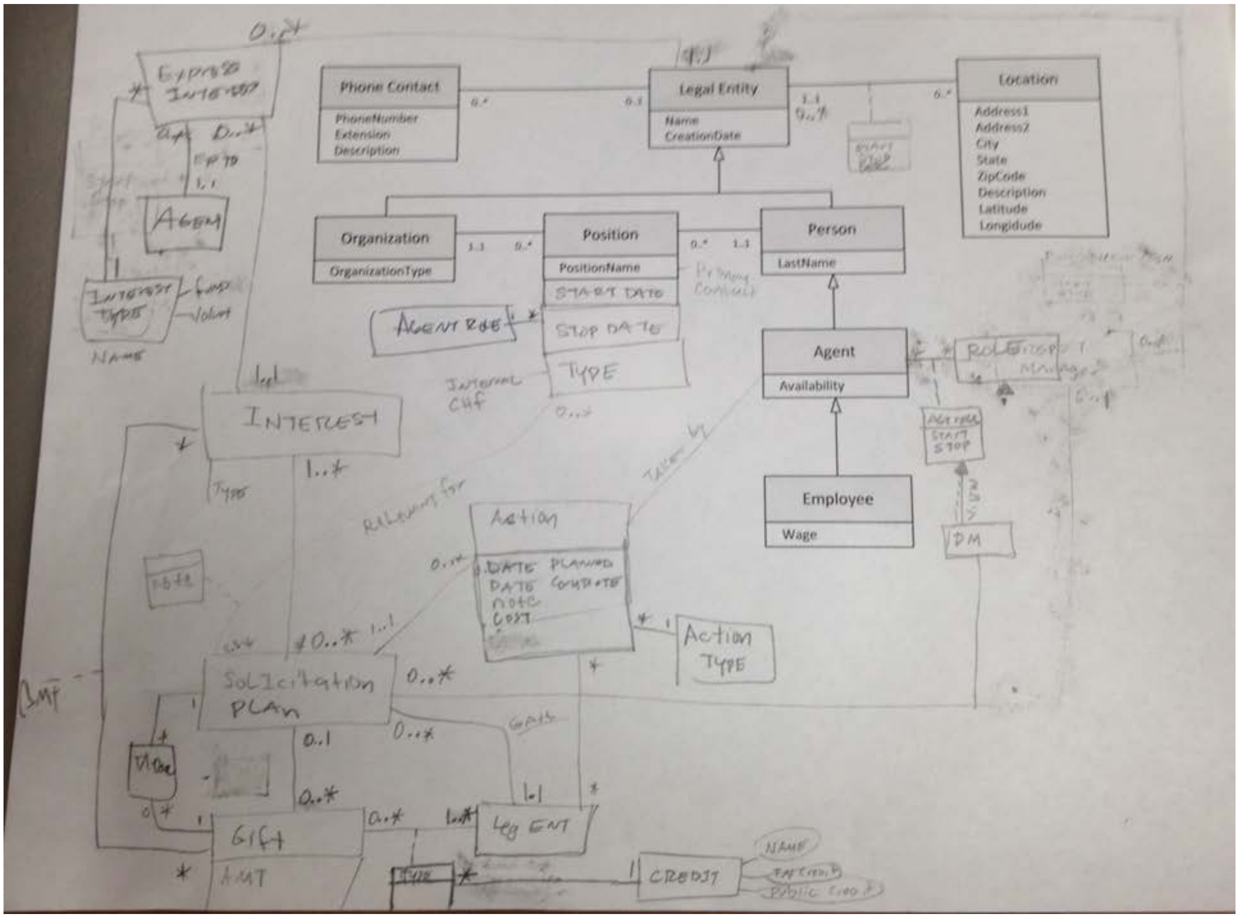
BASIC CULTIVATION PLAN	
	Activity
January	
February	Email
March	Invite to cooking class/foundation sponsored class
April	
May	Email with program update
June	Mailed invitation to event
July	Should likely be a process with something special for donors
August	Follow-up/thank you/solicitation
September	
October	Email--maybe something about Salem?
November	
December	Christmas cards
Minimal 7 contacts/year	
Need cultivation plans for various levels of donors, ultimately:	
	Low
	Mid
	High

SOLICITATION PLAN		
Cultivation Plans/Solicitation Plans/Actions		
Name		
	*LINK TO INDIVIDUAL/BUSINESS	
Fund		
	*LINK TO GIVING AREA	
Solicitor		
	*LINK TO VOLUNTEER	
Proposal Name		
Amount		
Amount asked	Date asked	
Amount expected	Date expected	
Amount funded	Date funded	
Status of Donor		
1 Identify		
2 Research		
3 Introduce and Interact		
4 Inform and Deepen Understanding		
5 Increase Involvement		
6 The Ask		
7 Stewardship		
Gift		
	*LINK TO GIFT	
	Type of Gift	
Action	*LINK TO SOLICITATION PLAN (can be multiple)	
Type of Interaction		
	Phone Call	
	Meeting	
	Mailing	
	Email	
	Task/Other	
Action Date		
Auto-Remind?		
Solicitor		
	*LINK TO VOLUNTEER	
Status		
	Complete	Date
	Incomplete	

BUSINESS/ORGANIZATION INFORMATION	
Database ID	
Name	
Address Type	
	Address Line 1
	Address Line 2
	City
	State
	Zip
Primary Contact	
	*LINK TO INDIVIDUAL
Prospect Manager	
	*LINK TO VOLUNTEER

INDIVIDUAL INFORMATION	
Database ID	
Name	
	First
	Middle
	Last
Address Type	
	Address Line 1
	Address Line 2
	City
	State
	Zip
Phone Type	
	Home
	Cell
	Email
	Business
Business Information	
	*LINK TO BUSINESS
Other Organizational Affiliation (foundation)	
	*LINK TO ORGANIZATION
Prospect Manager	
	*LINK TO VOLUNTEER
Family	
	*LINK TO INDIVIDUALS
*MARK IF PRIMARY CONSTITUENT	
*LINK TO INTERESTS/VOLUNTEER AREAS	

These lists got translated into something kind of like this:


Phone Contact
PhoneNumber
Extension
Description
Legal Entity
Name
CreationDate
Location
Address1
Address2
City
State
ZipCode
Description
Latitude
Longidude
Organization
OrganizationType
Position
PositionName
START DATE
STOP DATE
TYPE
AGENT ROLE
Person
LastName
Agent
Availability
Employee
Wage
INTEREST
Action
DATE PLANNED
DATE COMPLETE
note
COST
Action TYPE
Solicitation PLAN
Gift
AMT
CREDIT
NAME
DM