Introduction

I have written this book for the donors, board members, executive directors and fund development staff who believe that running a successful charity must involve good management practices and competent donor data processing as a means to build a sound financial future for their organization.

Fundraising is an entrepreneurial activity; adopting improved data management methods will help fundraisers find their "inner-entrepreneur!" Data is fascinating! It can tell you about your donors, about trends and it supports future possibilities. The knowledge we gain from working with data and the processes around it can be drawn upon to increase the value of what we know and improve how we work. The key is in retention and access to these valued resources; the outcome is a high performance team working in concert. Here is a bit of history as to why I felt *From Chaos to Control* was an important piece of work to share.

My work with charities began in 1988 when I first started developing a fundraising software application. Over the many years since that time, I have struggled to understand why more attention is not given to the handling of donor gift data. The management of this important funding resource is often delegated to data entry clerks and decisions regarding the management of the data appear more of an accident than a practice. The result has been that the quality of data and its management is far less than what it could be.

One significant outcome is the loss of organizational history - new managers often find it difficult to pick up where their predecessor left off. This is not an unusual occurrence, but rather common for both big-name charities, as well as small. Why are senior managers not intervening to ensure that their organization maintains a complete history of donor interaction?

These findings prompted many discussions around the problem and gave rise to some practical solutions. A productive work environment supports continuous improvement, and invests in its human capital to build a knowledge-driven work place. When they say "knowledge is power," they are right. Creating an environment where staff can work effectively, including conserving and sharing what they have learned, will benefit everyone in the organization.

It is unacceptable to expect donors to donate to an organization that struggles with basic management practices related to its fund development activities, particularly when it is funded thanks to the largess of donors.

Organization of computer documents, files and knowledge

Between 1986 and 1991, I worked at the University of Manitoba's Continuing Education Department, developing microcomputer training programs for businesses and their employees. Businesses, at this time were aggressively purchasing microcomputers, acquiring business software and taking training courses. Nowhere in this flurry to be more productive, was anyone concerned about a system that showed these companies how to *manage* what they were creating. Out of chaos came a methodology called "StationMaster" which I presented in 1991 at an international conference in Memphis Tennessee. Through the delivery of this methodology to businesses, the *Knowledge Management System* (KMS) was born.

KMS offered businesses a strategy to record their electronic tools and resources used to perform day-to-day work. This included recording forms, documents, policies, procedures, instructions, and standards; to make them shareable, accessible and easy to update. One of the most powerful outcomes for using a KMS was the ability to establish best practices using what the businesses' staff had learned. The KMS became the basis of how business units functioned and it evolved into a training/learning model which defined their knowledge environment.

In these early days, the concept of a "learning organization" did not exist in the not-for-profit realm. It was pretty much every person for him or herself

when it came to creating and saving information. Re-work, lost documents, redundant copies and wasted time were all things accepted as status quo. As a starting point, when working with a new client, we would implement the use of a simple KMS so that when we sent information to clients, they would have a place to save it. We, in turn, could then reference the information with them.

The use of a KMS introduces you to the concept of information management, leading to better methods to organize and store electronic resources. By eliminating electronic clutter and duplication of effort, team members can swap busy time for productive time and more beneficial activities. Being able to retain and use operational knowledge elevates the performance of current staff and becomes a training platform for new hires.

Epiphany! The norm is not the norm - creating order

In the late 1990's, *The Batsch Group* marketed a program complementary to the Knowledge Management System. Developed by Kerry Gleeson of the Institute of Business Technology, the "Personal Efficiency Program" (PEP) showed our office staff something very interesting. We learned that sometimes what we believe to be "the norm" is simply our own lack of training. From a personal perspective, I learned that a desk piled high with papers was not the working environment of a busy person but of a disorganized one and to me this was an epiphany! I came to a very clear understanding, that when I walked into my office, it was my desk that determined my priorities for the day, not me. That lesson has stayed with me to this day and when my desk gets cluttered, I take time to clear it according to PEP and free myself to choose my own priorities and use my time more effectively.

This epiphany taught me something personally and professionally; no one teaches us about organization. Some people are naturally more attuned to being organized but they are few and far between. The principles of PEP helped all our staff to understand and learn better ways to perform work and organize all the tools we used.

Kerry Gleeson says,

*"Be as clever about completing things
as you've been putting them off."*

*"This constant, unproductive preoccupation
with all the things we have to do is the single
largest consumer of time and energy."*

About chaos

The outcome of these experiences combined with my up-close interaction with charities has given me the opportunity to witness first-hand how a chaotic environment takes its toll. A nonprofit may find that donations are down, donor relationships have not been well-recorded, and organizational history is in disarray. We call this chaos. It's frustrating and yet understandable, as this has been an accepted way to work. There have been few successes identifying the root problem, let alone determining a solution or management paradigm to solve it.

Chaos is *not* the norm. It is my intent to help you experience an epiphany much like I did. **From Chaos to Control** is dedicated to identifying common data and information management issues that can be resolved through practical and sustainable solutions to ensure a more productive work environment.

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