Deceased Donor Management
Death Checklist

Encountering and handling the records of the deceased is a normal, quotidian operation for non-profits, so it's important that fundraisers understand how to handle those records in a sensitive and appropriate way.

It's likely you already know why it's important to be able to flag and properly handle the records of the deceased: death occupies a very specific place in the human experience and grief deserves our consideration, compassion and respect.

Your management of deceased records has a significant impact on donor trust. Doing the best you can to avoid soliciting donations or offering services to deceased individuals can help your organisation defend against excess costs, possible fraud, and unwanted publicity that may be damaging to your reputation.

Furthermore, while the relatives of the deceased may not be supporters of your organisation in the traditional sense, those who feel they received the care and support they needed at this sensitive time can be powerful influencers of those around them.

Regardless of how well we understand the why, tackling the how of deceased supporter management can present a unique challenge.

Drawing on DCA's experience in contact centre operations, donations processing, and database management across the not-for-profit sector, this checklist helps you prepare your organisation to receive notice about supporters who have passed.

HAVE AN ORGANISATION-WIDE POLICY RELATING TO DECEASED SUPPORTERS

Despite the best efforts of all involved, it isn't always possible to catch messages before the arrow has left the bow. For example, it's possible that direct mail can be en-route when someone passes. It's important that you have a policy in place to manage notifications that you may receive in those cases.

- Key staff who may come into contact with donors must all understand your organisation-wide policy regarding deceased individuals – this policy should be clearly documented and accessible to all staff
- Have a script and an editable email template for contact centre staff to use – these should be kept up-to-date and closely align with your policy
- Keep your messaging consistent, internally and externally, and make sure your staff understand any associated privacy obligations
- Ensure your staff know what to do with return to sender mail that arrives labelled 'deceased'

CHECK YOUR DATA USING THE AUSTRALIAN DEATH CHECK

The Australian Death Check is the only official register of death data in Australia.

The register is updated daily, and it holds in excess of three million government death records, making it the single best way to limit the potential for contacting deceased supporters.

Using the Australian Death Check to flag deceased contacts is integral to minimising the risks associated with accidentally soliciting donations from people who have passed away.

MAINTAIN A DEDUPLICATED SINGLE SOURCE OF TRUTH

If your donor database includes duplicate records, it means that when a customer service officer marks a donor as deceased, it is still possible for another record concerning that donor to be funnelled into a campaign and contacted with an automated email or a direct mail out.

Even the most watchful organisations can end up with technically different but functionally identical duplicate records (such as "M Smith" and "Mr & Mrs Mike Smith" of 12-14 Smith St and 12 Smith Road, respectively), so it's important to make sure your data gets cleaned regularly.

Nobody wants to keep receiving donation requests for a family member who died six months ago—and they definitely don't want that when they've already informed an organisation of the death. You can avoid that via regular deduplication of your database.

Ensuring your supporter database is a single source of truth means that there's one "master" set of data, and once a change is made there, it gets automatically propagated to any place that might refer to that record. Changing the status of your donor or service recipient record to 'Deceased' in a single source of truth would mean that any other reference to that person would also contain the information that they're deceased—that could mean a mail house, your electronic direct mail platform, or an integrated third-party supplier. A single source of truth will save you a lot of time and trouble in the long run.

EMPOWER YOUR STAFF TO USE THEIR OWN JUDGMENT

Once you have a clear organisation-wide policy, contact centre staff will have a good idea of what the outcome of a call or email should be and of the experience with which you want supporters and their families to walk away from that point of contact. It's wise to have general scripts and templates, but there are points at which it can be best to let the person on the ground make the call.

For example, many organisations, keen to extend their processing window and prevent any accidents, require two weeks' notice to cease the processing of regular monthly donations. The notification of a donor's death might be one circumstance under which contact centre staff should be free to waive such a waiting period and fast-track the end of a monthly donation.

Contact us on 03 9320 9000 or visit data.com.au

THINK BEYOND DATA MANAGEMENT

Poor customer service is often the normal experience for someone who must inform representatives over and over that their partner, parent, sibling or child has died.

It's important to move past any assumption that call centre staff naturally lack empathy. As we've experienced in the DCA contact centre, team members confronted with the unexpected presence of death in an otherwise mundane conversation may simply try to move past it as soon as possible. That's how you get awkward responses like, "Okay. Do you have a death certificate?" or "Sorry, unless I have authorisation from the account owner, I can't change that."

Fortunately, there are resources out there to help better navigate conversations you might have about death.

The Australian Centre for Grief and Bereavement (ACGB) is an independent, not-for-profit organisation and the largest provider of grief and bereavement education in Australia, and among their free resources, they have some suggestions about what kind of approach may be best when engaging with the recently bereaved.

Contrary to the first instinct of many call centre operators, it's usually better not to rush past the mention of a death in the conversation.

ACGB offers suggestions for speaking to the bereaved, such as ensuring that the loss of a person is acknowledged directly, using the deceased's name, and allowing some room for bereaved callers to talk about a recent loss.

Often, a caller will want to be heard and acknowledged in their grief, and a good operator will be able—and will have the organisational backing—to listen fully, acknowledge the situation, and help them resolve the problem they're having afterwards. Under these circumstances, the need for professional boundaries can be difficult to navigate, so it will be worth discussing what practices are right for your organisation with donor-facing staff who may be required to manage these interactions.

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