



Using Little Green Light in Schools



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Timi is passionate about assisting mission-driven organizations to better manage their data so that they can be more strategic in their development efforts. She is a true evangelist of LGL, first as an early adopter and user of Little Green Light, and now, as LGL's Senior Marketing Manager.

Introduction

Since the inception of Little Green Light, schools have found tremendous value in using our donor management system to track not only their donors and donations but also information about their students and families.

Since schools make up almost 20 percent of our customer base, we've gathered some great insights into how they have benefited from managing their data in Little Green Light. This guide serves as a resource for any school or educational organization that wants to use Little Green Light to optimize their data management process and streamline their workload.

What we'll cover in this guide:

1. Best practice tips on successfully managing information about families, alumni, and donors in Little Green Light
2. How to use Little Green Light in conjunction with your school information system

**TIPS ON
SUCCESSFULLY
MANAGING
INFORMATION
ABOUT
FAMILIES,
ALUMNI, AND
DONORS**

One of Little Green Light's super powers is how easy it makes keeping track of people who are important to your school. This can include current and past students, families, donors, volunteers, and more. By using some fields developed especially for school customers, you'll be able to maintain the information you need to be successful in your development efforts, without breaking a sweat!

In this section, we will review the school-related fields available in Little Green Light and provide guidance on how to use them. These fields are:

- **Class-year affiliation, including class affiliation type and class year**
- **Education**
- **Groups**

Note: The Little Green Light Knowledge Base is a resource designed to help you learn how to use Little Green Light features. One article in particular, "Tracking school-specific data in LGL," shares how you can enable school-specific fields in your account and how to enter data into those fields.

Class-Year Affiliations

The Class-Year Affiliation field is made up of two parts: The class affiliation type (e.g., student, parent, etc.) and the class year (often the year of graduation or anticipated graduation).

Using the “Student” class affiliation type:

When trying to keep track of current and former attendees of your school, we recommend using the class affiliation type of “Student”. The “class year” associated with the affiliation type will tell you if that student is currently attending your school or is an alumnus. The benefit of this approach is that when you use “Student” as the type instead of a tag called “Alumni” or “Current student”, you won’t need to make bulk updates to student records upon graduation. This will save you loads of time!

Tip: It is easy to generate a list of students by a specific class year or range of class years using the Advanced Search mechanism at the top of the All Constituents view. You can search by “Class Affiliation” type, class “Year”, or a combination of these fields.

For instance, if you want to generate a list of students whose class years are either 2012, 2013, 2014, or 2015, you could do a search like this:

Advanced Search

Show constituents where

All of the following are true

Class Affiliation Types: Student

Years:
e.g. 2000 to 2004

[Add more criteria](#) • [Advanced options](#)

Or, if you simply want a list of all records that have a “Class Affiliation” type of “Student”, you could create the below search—just leave the Years field blank:

Advanced Search

Show constituents where

All of the following are true

Class Affiliation Types: Student

Years:
e.g. 2000 to 2004

[Add more criteria](#) • [Advanced options](#)

Using “Parent” or “Grandparent” class affiliation types: “Parent” or “Grandparent” affiliation types are handy when you want to identify the parents or grandparents of students who are graduating or have graduated in a specific year, i.e., all parents who have a student graduating in 2016.

Tip: It is possible for constituent records to have multiple class-year affiliations associated with them. For instance, you may have a constituent who attended your school, graduated in 1984, and has three children of varying ages, all of whom have attended your school. In that case, you might see the following Class Years info in a constituent’s profile page:

Class Years
Student, 1984
Parent, 2012 - Christopher
Parent, 2015 - Cory
Parent, 2017 - Kaleigh

 Edit affiliations

* In this example, we took advantage of using the class-year affiliation Note field to capture the name of the child for easy reference.

Edit affiliations

Add or remove class year affiliations. Click the *Add another affiliation* link to add a new class year affiliation.

Class year affiliation	Year	Note	
Student	1984	Timi	<input type="button" value="Remove"/>
Parent	2012	Christopher	<input type="button" value="Remove"/>
Parent	2015	Cory	<input type="button" value="Remove"/>
Parent	2017	Kaleigh	<input type="button" value="Remove"/>

By using the class-year affiliation field, you'll never need to update current students to alumni or current parents to past parents, because you'll be able to perform a simple search, using the year of graduation and the type, to determine their status.

Tip: It's possible to add your own class affiliation types. This might be helpful when you want to track withdrawn students, for example, or when two schools have merged and you want to identify students and families from their schools of origin.

Education Info

Education Info fields are viewable in the Related Information section of the constituent profile page. These fields can be a great way for you to keep information relating to the schools that your constituent attended prior to and after attendance at your school. If you're using class-year affiliations to track the constituent's connection to your school, there's no need to repeat that information in this Education Info area (just use it to track schools other than yours).

In addition to tracking the name of the school, you can identify the school type, the year, degree and focus, or major:

Edit schools

Add or remove schools. Click the *Add another school* link to add a new school.

School	School Type	Year	Degree	Focus/Major
<input type="text" value="UCLA"/>	<input type="text" value="College"/>	<input type="text" value="1988"/>	<input type="text" value="BA"/>	<input type="text" value="Arts"/>

Add class year affiliation?

Tip: Tracking education info about your constituents can provide insight into the college or university your alumni attended so you can connect them with current students who are interested in attending that university. It can also be useful for tracking the schools your current students attended prior to coming to your school.

Groups

We recommend special consideration for managing groups related to schools. In this section, we review best practices for using groups and class-year affiliation fields to track students, alumni, parents, and grandparents.

If you choose to create group values to identify students, parents, or grandparents, it is best to do so at a high level.

In other words, if you want to identify those who are or have been a parent at your school, a group value for "Parent" makes sense. The benefit of this approach is that you'll quickly be able to see the number of student or parent records you have in the database by viewing your filters on the All Constituents page.

But, if you are trying to differentiate your current parents from your past parents, it is better to use class-year affiliation fields in addition to or instead of a "Parent" group value. This is because creating "Current parent" and "Past parent" group values will require a manual update of groups as students enter and leave your school.

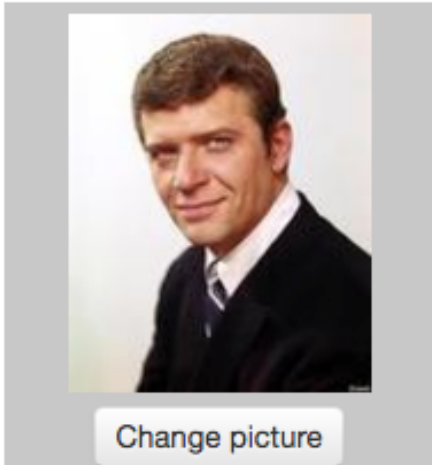
Groups (cont.)

Here's an example record using a "Parent" group value in addition to class-year affiliation fields:

Individual details: *Brady, Mike* ID: 951367

Name Information

Addressee/Label Name Mr. and Mrs. Mike Brady	Salutation Mike and Carol	Annual report name Mr. and Mrs. Mike Brady
Alt. addressee Mr. Michael Brady	Alt. salutation Mike	Honorary name None defined
First name Mike	Last name Brady	Middle Name Bob
Spouse/partner name Carol		
Employer Brady and Sons, LLC	Job title Architect	
Birthday N/A 📅		
Nicknames Mikey		



[Change picture](#)

MailChimp Information

MailChimp Status
Subscribed

Categories

Contact types Primary	Groups Brd member, Parent, Member, Volunteer
Communication Tags ED contact only, Do not call	Acknowledgment Preference Prefers email

[Show all categories](#) [Edit all categories](#)

Related Information

Relationships Brady, Greg (Child) More... Brady, Marcia (Child) More... Brady, Cindy (Child) More... Brady, Carol (Spouse) More...	Class Years Parent, 1984 - Greg Parent, 1986 - Peter Parent, 1990 - Bobby Edit affiliations
---	--

[Edit relationships](#)

If you use class-year affiliation fields to track the year that the student graduates, you'll be able to search your database for students or parents currently attending the school and/or for those who have graduated.

**USING LITTLE
GREEN LIGHT IN
CONJUNCTION
WITH YOUR
SCHOOL
INFORMATION
SYSTEM**

Schools face some critical decisions when deciding how to track school family information in Little Green Light. For schools using a separate school information system (SIS) for registrar and family data, it's important to consider the implications of maintaining similar information in two separate databases, and how, if at all, to marry these two bodies of information.

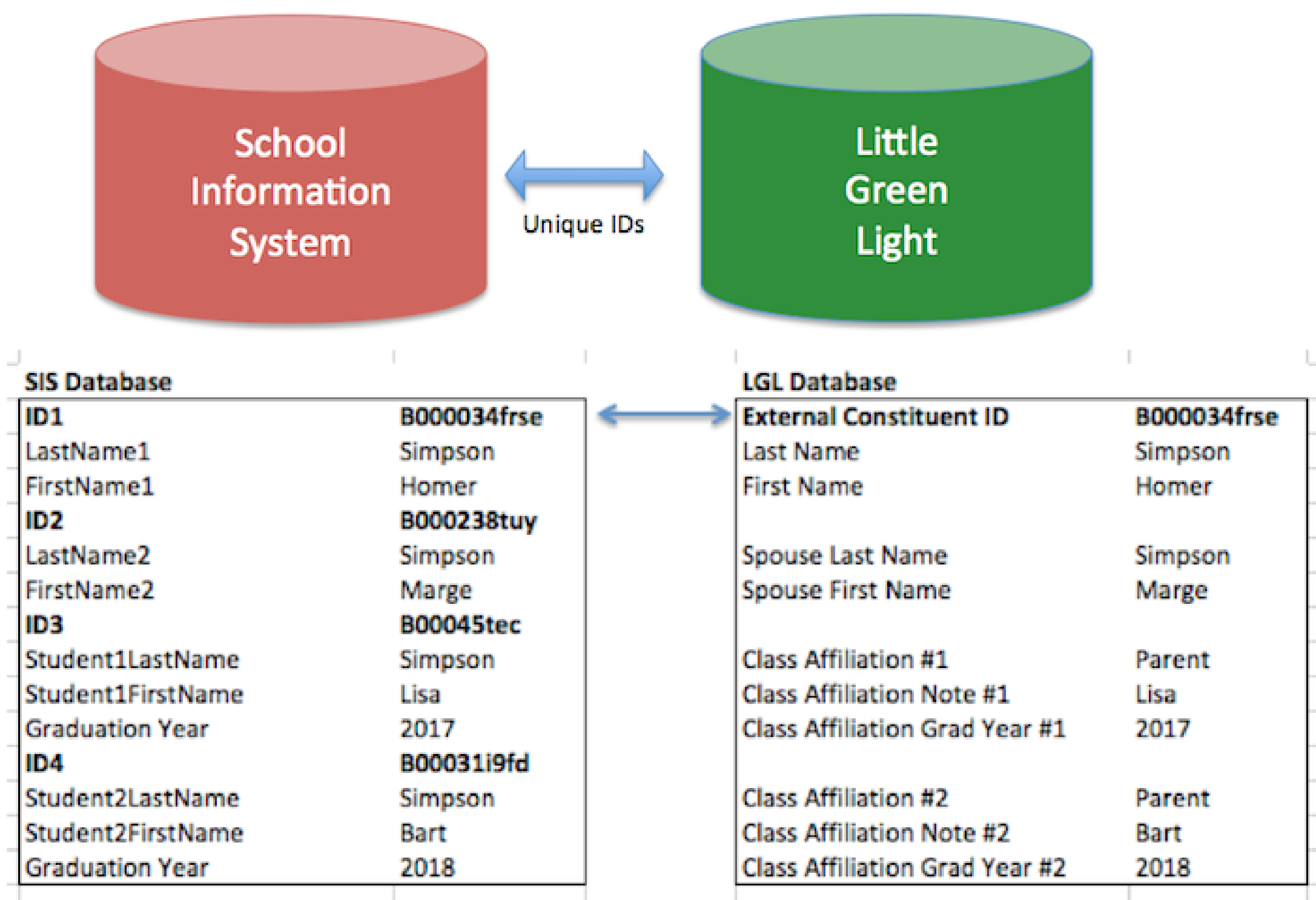
Keep your SIS and LGL records in sync by using a unique identifier

If you use a formal school information system, you likely have a unique identifier for each student record. If you plan to import this data into your Little Green Light account, it's vital to include this ID, along with the other data fields you want to transfer, because:

- It helps you populate your LGL database when you first move into LGL
- It's critical to helping you update records as you get them from your SIS database, such as when a new school year starts

It's also important to understand how the data structure in your SIS database will map to the data structure in your LGL database. SIS systems are often built around student records, whereas LGL may be based on parent records. While you need to be able to sync the two, don't feel like you have to set up your LGL database in the exact same way as your SIS database. As the illustration below shows, see if you can map household-related records from your SIS database into a single record in LGL.

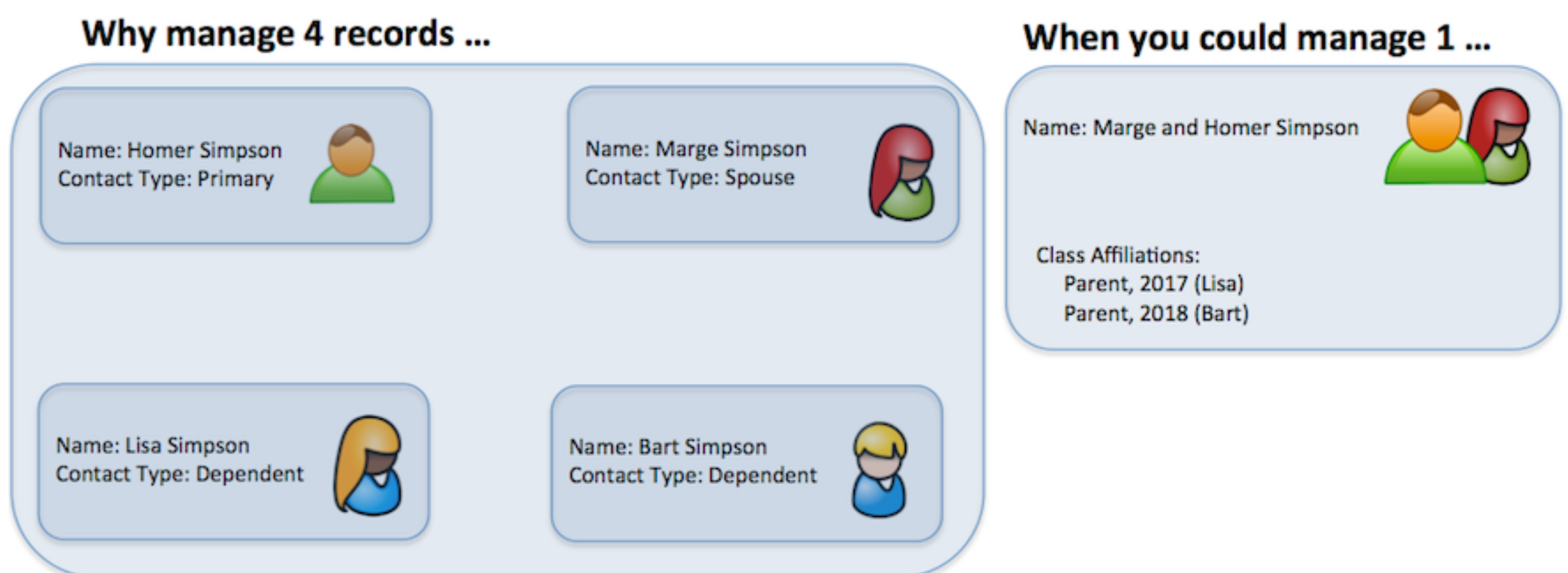
Keep your databases in sync with unique IDs



The Little Green Light Flex Importer lets you load spreadsheets of data (this includes data that is quite complex) into LGL. If you aren't familiar with the Flex Importer, you can learn more about how to use this powerful tool in the Knowledge Base.

Householding strategy: Keep it simple for as long as possible

Should you create a record for each member of a household? Or should you create a single record for the household? As illustrated above, our recommendation is to keep it as simple as possible for as long as you can. While it's tempting to think about all the rich detail you can capture about every individual, it's a good idea to ask yourself whether you really need that level of specificity about all the people in your database.



You can store information about a family in a single record using the Salutation and Addressee fields to address the family appropriately as "Homer and Marge" or "Simpsons Family". You can also identify phone numbers as "Father cell" or "Mother work" and so on by editing Contact Info menu items in the Settings > Menu items area. For more on householding options in LGL, see the "Managing households in LGL" article in the Knowledge Base.

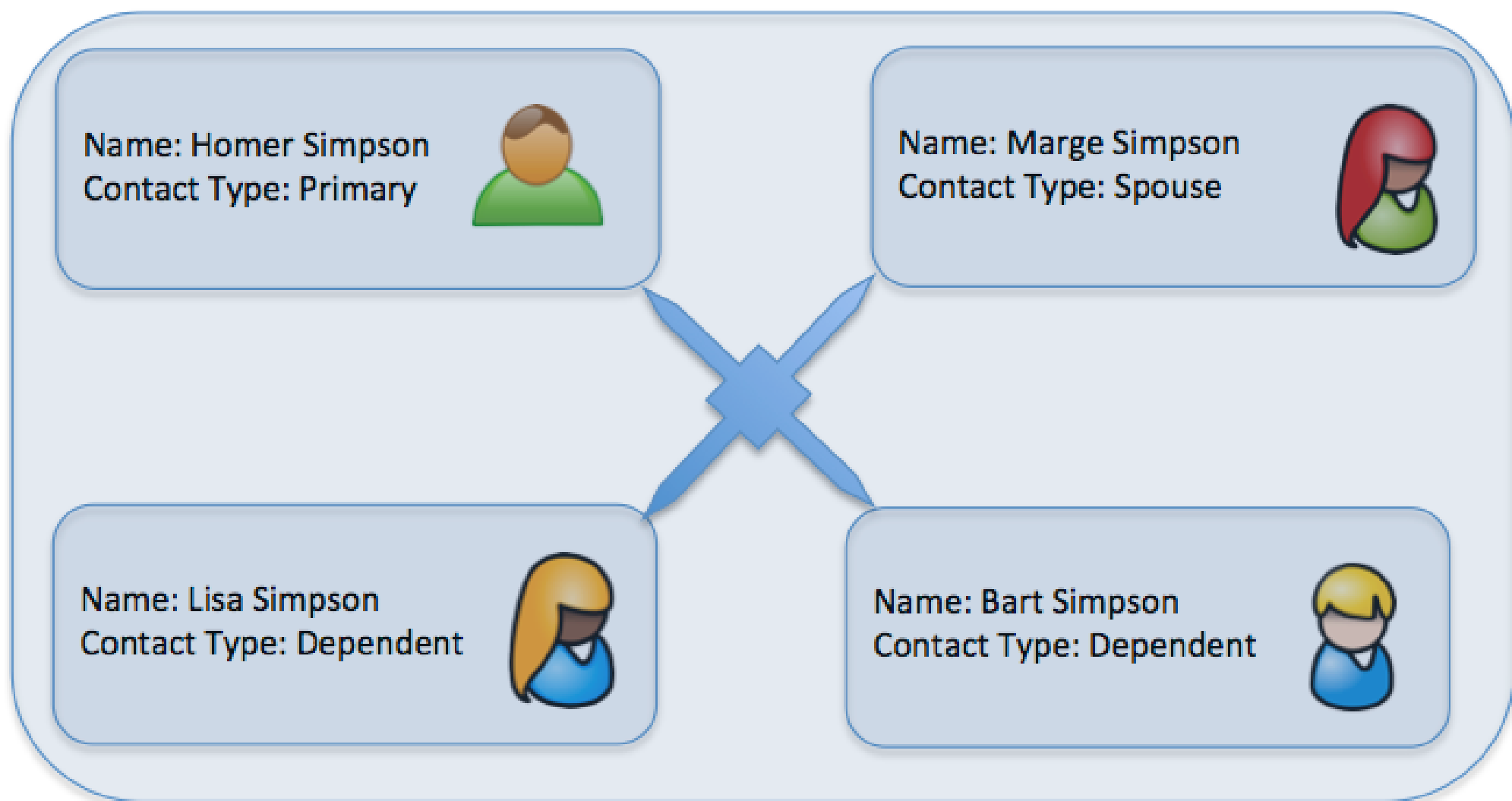
What about student records?

With the "keep it simple" philosophy in mind, one approach to consider is to create a record for the student once they've graduated, when they become a more viable candidate for fundraising appeals. In this approach, you can use the Class Years fields to capture the name of the student (in the class-year affiliation Note field) and the student's graduation year (in the class-year affiliations field). You can add as many class-year affiliations as you like. For more information, see the "Tracking school-specific data in LGL" article in the Knowledge Base.

What if you can't keep things simple? Relationships to the rescue!

Many Little Green Light customers choose to maintain separate records for each member of the family, and do so from the time the student enters the school. In this case, the use of relationships in Little Green Light helps simplify things.

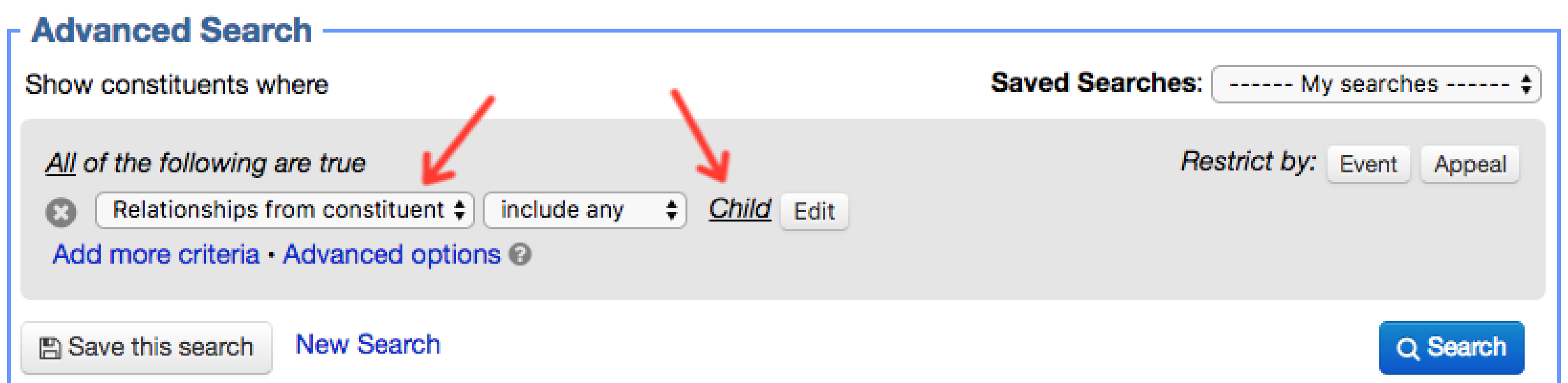
Use relationships to tie records together



Little Green Light supports relationships between constituent records. Relationships are a handy way to see who is related to whom and offers the option to click from one record to the record of a relation. You can share contact information (address and phone) between related records too. This simplifies the process of copying contact notes between the records and makes it easy to soft credit the related constituent. For more details, see the "Creating relationships between constituents" article in the Knowledge Base.

Searching and reporting using relationships

You can find constituents with specific types of relationships to other constituents. This functionality lets you search on either direction of the relationship, from or to, to narrow down your search. This can be helpful in terms of finding people in your database who are related to children at your school:



The screenshot shows the 'Advanced Search' interface. At the top left, it says 'Show constituents where'. On the top right, there is a 'Saved Searches' dropdown menu with 'My searches' selected. Below this, the search logic is set to 'All of the following are true'. A search criterion is defined as 'Relationships from constituent' with the operator 'include any' and the value 'Child'. Two red arrows point to the 'Relationships from constituent' and 'Child' fields. To the right of the search criterion, there are 'Restrict by' buttons for 'Event' and 'Appeal'. At the bottom left, there are buttons for 'Save this search' and 'New Search'. At the bottom right, there is a blue 'Search' button with a magnifying glass icon.

Include relationship data in a report

Often you'll want to see the constituents you search for and the people who are related to them included in the same report. You can use the "Multiple Relationships" report column to achieve this, then customize the relationship fields you want in your export. Make sure to set the Count option to an appropriate number. (Note that if you leave this setting on "1" you'll see only a single relationship included in your report.)

Select the fields that you would like to add to your CSV/XLSX export.

Customize field order (drag and drop) and settings. [Quick Preview](#) | [Remove all](#)

Constituent Fields > [Add all](#) | [Remove all](#)

Constituent Category Fields

Contact Info. Fields

Gift/Pledge/Goal Fields

Appeal & Event Fields

- LGL Constituent ID
- External constituent ID
- Constituent Type
- Prefix
- First Name
- Middle Name
- Last Name
- Suffix
- Maiden Name
- Sort Name
- Addressee
- Alt. Addressee
- Calculated Addressee
- Salutation
- Alt. Salutation

Multiple Relationships [Add another](#) · [Customize](#) · [✕](#)

Label Prefix

Select columns to include

- Related: LGL ID
- Related: Name
- Related: Relationship

Relationship Type [Select](#)

Count
How many records per row?

[OK](#)

In conclusion

One of the greatest lessons we've learned is the importance of first considering how the data you are maintaining will impact the work that you need to accomplish. Little Green Light provides you with lots of opportunities to capture a wide variety of data points, but if you don't need all those data points you may find yourself swimming in useless information. Although it is tempting to capture every single piece of data, first consider whether that data point is actually required. Your development plan can help you to identify just that!