



Northern Illinois
University

Your Future, Our Focus

Maximizing Donor Data: Tips and Strategies

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1

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AGENDA



- What type of fundraiser are you?
- What are your BIG donor questions?
- What data do you have?
- Types of data
 - Administrative data, secondary data, primary data
- What data do you need?
- How do you collect it?
- How do you analyze it?
- How do you use it?

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What type of fundraiser are you?



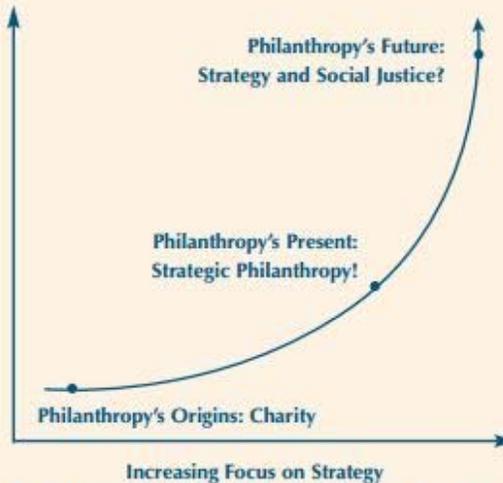
- Hand out
- <https://askingmatters.com/>
- 3 minute asking style quiz



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Increasing Focus on Social Justice

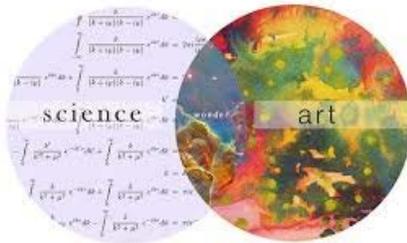
- Emphasis on social and systemic change
- Prioritizes and empowers underserved communities
- Advocacy, community organizing and civic engagement by those most affected



- Emphasis on measurable impact
- Evidence-based strategy
- Clear goals
- Feedback

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Fundraising: An Art AND a Science



- **Art:** listening, feeling connected to the donors, empathy, sincerity, thanking donors, respecting donors
- **Science:** donor prospect, analyzing who to approach (prospect research), keeping careful notes and records (database management), donor recognition

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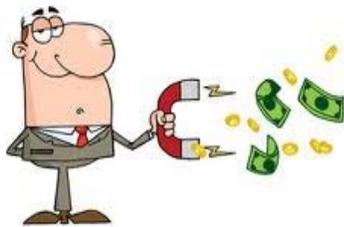
In search of the Money



- Large mission or undefined mission
- No strategy
- Look everywhere for money
- Emotional appeals
- Change programs to meet funding requirements
- Uneven revenue streams
- Higher staff/Board turnover
- Narrow support
- Risk-averse organizational culture

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Attracting money



- Mission driven: partnerships, strategic alliances
- Transparent
- Have a strategic plan and live it
- Focused on outcomes, results
- Board/staff stability
- Deep and focused support
- Stable and focused sources of support
- Learning organizational culture

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Nonprofit Sustainability = "the double bottom line"



Financial EFFICIENCY

Money

- Are we managing our resources for maximum efficiency?
- Are we getting enough financial return/profitability to continue?
- How do we measure this?

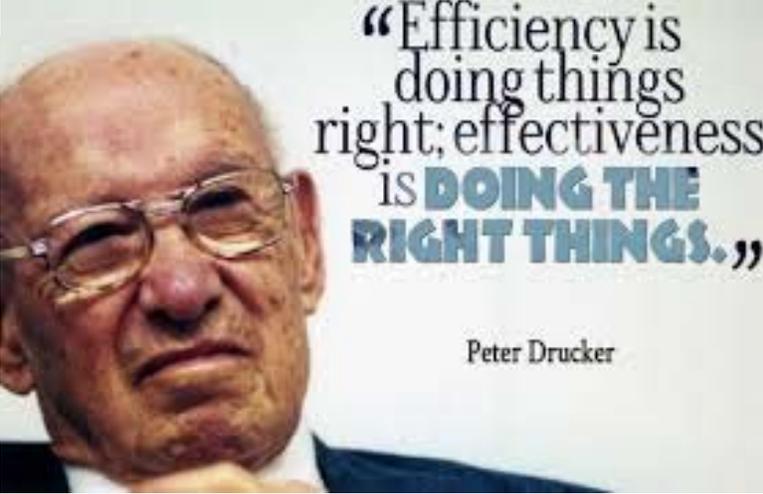
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Program EFFECTIVENESS

Mission

- Are we meeting our program goals and objectives (inputs, outputs, outcomes)?
- Are we having an impact on our mission?
- How do we measure this?

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“Efficiency is doing things right; effectiveness is **DOING THE RIGHT THINGS.**”

Peter Drucker



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THE CHRONICLE OF
PHILANTHROPY

NEWS AND ANALYSIS
MARCH 29, 2015

**Nonprofits Struggle to Use Scientific Data
in Their Fundraising**

By Michael Anft

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Why?



- "Charities are scared of their donors," says Uri Gneezy, a professor of behavioral economics at the University of California at San Diego.
- "Instead of shying away from the costs and risks of experimentation, they need to be upfront with donors and tell them that they need to run their operations like a business, seek out the best science, test out their methods, and express that they are doing everything they can to get the most out of the donor's dollar".
- Experimentation can be great for donors who believe in experimentation but not for others.

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What are your BIG donor questions?



- Do you know your donors?
- What information do you keep on your donors?
- How accessible is that information?
- Is it available to all staff or board members?
- How confident are you that it is current?
- If you could start over, what would your donor information system look like?

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Primary Data Collection



- Administrative data: what data do you already have that could give you insights about your programs or services?
- What data would you like to have and how would you use that data?
- What questions do you have that you can't answer right now?
- Gap?
 - College/university faculty, programs, courses, independent studies
 - Consultants
 - Staff/volunteers

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Secondary Data Sources



- Free and publicly available data sources:
 - Impact DuPage <http://www.impactdupage.org/>
 - Data Ferrett <http://dataferrett.census.gov/>
 - American Community Survey (ACS) American Community Survey (ACS)
<https://www.census.gov/programs-surveys/acs/>
 - PUMS Data www.ipums.org
- Data assistance: Sherrie Taylor, Research Associate, Center for Governmental Studies, NIU, Phone: (815)753.0925 E-mail: taylor@niu.edu

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Why Embrace Data? *Competition*



- For philanthropic support
- For grants
- For volunteer time
- For community support
- For government/political support
- For corporate support

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When do you need data for fundraising?



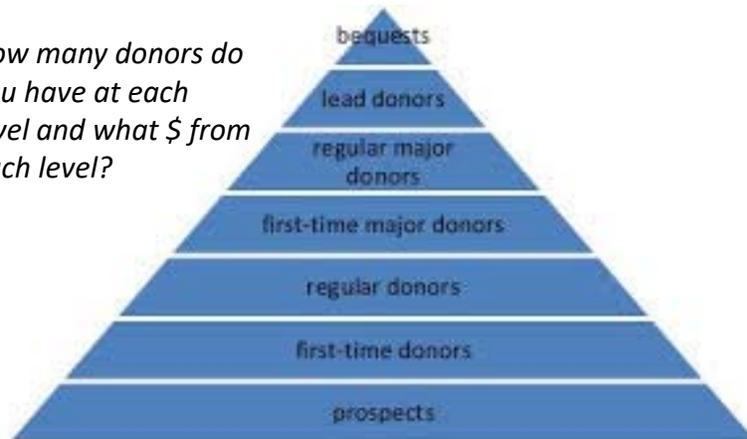
- **Prospect research:** who are potential donors; likes, dislikes, capacity to give, interest in your mission, history of giving
- **Planning:** history of giving, segmentation of donors, annual goals by campaign, setting fundraising budgets, attrition or growth of donor support, trends
- **Cultivation:** timing, when to reach out, how to get them involved, listening, gathering information, building relationships, motivations for giving, personal recognition desired
- **Solicitation:** how, when, how much, responses, who should solicit
- **Stewardship:** how do they want to hear from you and when, knowing what's going on their life
- **Organizational Learning:** What's working or not in your fundraising, what campaigns are more successful, what appeals, donor retention rates, donor gift level info, building a culture of philanthropy

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Planning: The Donor Pyramid



How many donors do you have at each level and what \$ from each level?



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Cultivation: Know Your Donor Types



- Checkbook Philanthropists
- Responsive Funders
- Venture Philanthropists
- Results-based Philanthropists
- Collaborative Funders

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Where do you gather the data?



- Software or system used?
- Who is responsible for the input of data?
- Who needs the outputs of the data (reports)?
- Who else should have access to donor information?

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Spreadsheet versus Database



Spreadsheet (Excel)

- Rows and columns of data
- Data to feed into database
- For mail merges
- Easily analyze numeric data
- Great for financial reports
- Summary data but not relationships between data
- Create charts and graphs
- Limited numbers of rows and columns, difficult to see

Database

- Fields (columns) and records of data (rows)
- Can incorporate all different types of data
- Easily manipulate large amounts of data
- Create queries and reports easily
- Understand relationships between data
- Multiple users, cloud
- Work in database to create emails, mailing labels
- Better search functions
- Standardization of data entry

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Donor Segmentation



- [Video](#)

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Back to your donor questions



- What questions could you answer using a spreadsheet and what questions would better be answered using a database?
- Example?

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Excel Data Demo



- Data Entry: rows versus columns
- Clean data
- Sorting Data
- Analyzing Data

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Databases



- Software
- Cloud programs
- Access

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Salesforce



- Teach yourself [online](#) for free using Trailhead by Salesforce



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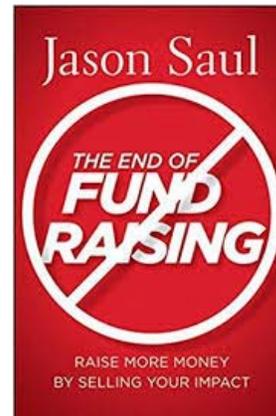
Downside of NOT tracking data



- Don't know what's working or not
- Using bad information in cultivation or solicitation (outdated information, wrong names)
- Appearing unprofessional or trustworthy with information
- Weak culture of evidence-based decision making and philanthropy

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Book Recommendations



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Podcast Recommendations



- Doing Good Podcast
- Social Good Instigators
- Nonprofits are Messy: Joan Garry
- Nonprofit Hub Radio

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