




Non-Profit Data Management 101

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What has more
value than a
donation?

DATA!

Why is Data Important?



Build Strategy

Objective Information Informs
Decisions



Build Strong Relationships

Effective Outreach
Increased Donations
New Donors



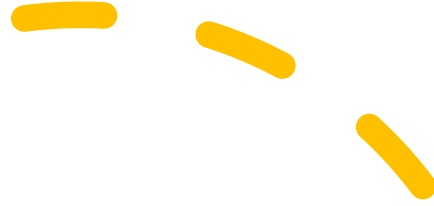
Use CLEAN data

Actionable
Accurate and Reliable Reporting
Increased efficiency

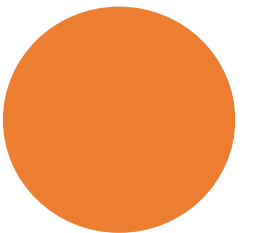


Data For Nonprofits

- Communications
- Client & caseload management
- Donor cultivation & stewardship
- Grants
- Social media/email analytics
- Surveys & feedback
- Building strategies based on success/failure
- Determine your impact



A survey of nonprofits by Hubspot found that many want to make better use of their data, but less than half frequently use their data to make decisions.



Common Data for Nonprofits



Financial Records

Donations
Grants
Sponsorships



Events

Invites
Attendance
Sponsorships
Auctions



Board Development

Cultivation
Meetings
Terms & History



Volunteers

Cultivation
Activities
Thanks
Milestones of Service



- Stewardship
- Targeted info
- Better Fundraising Outcomes

- Appeals
- Thanks, and Donation Receipts
- Newsletters
- Emails

A large, solid orange circle occupies the right half of the slide. Inside the circle, the text "Communications & Donor Cultivation" is written in white. A smaller, solid blue circle is positioned at the bottom right edge of the orange circle.

Communications & Donor Cultivation


Donor Data for Nonprofits

Types of Donor Data You Should Have

- **Demographics:** age, gender, ethnicity, income, education, marital status, etc.
- **Why Donors Give:** What are your donors' motivations?
- **Donation Method:** mailed check, credit or debit card, online donation, cash, etc.
- **Gift Type:** Cash vs. in-kind or restricted vs. unrestricted.



Using Data to Manage Donors

- Establish Goals
 - Create Personal Profiles
 - Donor Journey Maps
 - Donor Segmentation
 - Comprehensive Communications Plan
 - Personalizing Communications
 - Reporting Progress to your Board
- 

Tracking Data for Grants

#s/demographics of population served

Event attendance for sponsorships

Testimonials

of volunteers

Community support/donations

Data Analytics



ANALYZE HISTORIC DATA



DIAGNOSTIC ANALYTICS



PREDICTIVE ANALYTICS

Data Visualization

Tips

- Keep It Simple
- Aesthetically Appealing
- Be Honest

Ways to Use

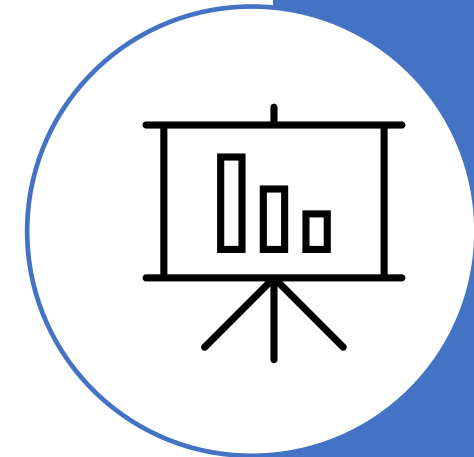
- Campaign Goals
- Fundraising Updates
- Show a Problem
- A Year in Review

Types

- Infographics
- Timelines
- Charts & Graphs
- Maps

Tools

- Microsoft Office Tools
- Tableau
- Google Chart




Data Management Strategy

- Criteria for selecting database software
- Definition of which types of data should be collected
- How data is stored
- Security protocols for donor data
- How to analyze data to gain insight into donor and prospect behavior
- How to be transparent with your data collection and usage practices

Source: <https://www.keela.co/blog/nonprofit-resources/nonprofit-data-management-strategy>



Best Practices


- Choose the right data management software for your organization
 - Determine what info you need to collect
 - Protect your donor data
 - Educate your team
 - Follow data usage rules and regs
 - Be transparent
 - Understand your metrics
 - Take on what you can manage successfully
 - Think longevity
- 

Best Practices for Data Entry

Formulate Internal Standards

- Ability to communicate on preference of contact
- Annual audits/cleanups
- Donation process timelines
- Addresses
- Names, how will you address each group?

REMINDER: Consider the handling of sensitive information/privacy

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- Understand what data can and cannot do – account and plan for limitations
 - Look for unexpected insights
 - Anticipate org's future data needs
 - Consistency is KEY –Standardize procedures, & clearly document
 - Create a workflow



Hot Tips

What is a CRM?

- **What a CRM can do:**

- Accommodate multiple users
- Aggregate data
- Provide insights over time
- Provide continuity
- Save time
- Make it easier to scale

- **What a CRM cannot do:**

- Run on its own
- Make up for information gaps
- Fix broken internal processes
- Provide a one-size-fits-all fix

Key CRM Features to Consider

Know Your Needs and Your Budget

Security/Backup Options

Comprehensive Operations &
Communications Management

Data Migration Process & Support

Nonprofit-specific CRM

- Contact organization
- Fundraising tools
- Communications tools
- Bonus
 - Data analytics and reporting tools
 - Intelligent tools
 - Project management
 - Integrations with third-party software

Which CRM is right for my organization?

Large

- **Raiser's Edge** – Other Blackbaud Tools (comprehensive, cloud, based)
- **Salesforce** – Nonprofit Cloud (larger orgs)
- **Donor Perfect** (comprehensive - larger orgs)
- **Driven** (Formerly Donor Engine – comprehensive and flexible)

Midsized to Small

- **Auctria** (small to midsize nonprofits, auction based)
- **Little Green Light** (small and midsize nonprofits)
- **Kindful** (simple, some reporting, designed for growing nonprofits, integration options)
- **Charityproud** (small to midsize, some analytics, some event management functionality)
- **DonorSnap** (Constant Contact integration – smaller nonprofits)
- **Funraise** (Intuitive, simple)
- **Keela** (some intelligent tools)
- **Bloomerang** (core functionality & focus on donors)
- **Network for Good** (basic, easy to use)

Very Small

- **Donate Kindly** – processing fee only
- **GiveLively** – free donation platform
- Crowdfunding softwares

Any Size

- **Virtuous** (lots of relationship focus)
- **Wild Apricot** (membership based orgs, cloud based)
- **Eleo** (cloud based, communications tools, Paypal)
- **GiveSmart** (auction and events based)
- **Neon CRM** (cloud based, many features)
- **Salsa** (cool dashboards)
- **NonprofitCore** (Foundant)
- **EveryAction** (advocacy based)

Questions?



A red pushpin is stuck into a map, with a blurred background of a city street scene. The pushpin is in the lower-left corner of the image.

Resources

- [5 Ways to Simplify Nonprofit Donor Management](#)
- [Nonprofit Data Visualization](#)
- [Nonprofit Data Management Strategy](#)
- [How to Convince Your Board You Need a CRM](#)
- [CRM Software Comparison](#)
- [How to Decide Which Fundraising Software Your Nonprofit Should Use](#)
- [Choosing a Nonprofit CRM](#)
- [A Crash Course for Selecting and Implementing a Nonprofit CRM](#)
- [Non Profit Data Management Email List Cleaning](#)