



Data, Curiosity, Creativity: **Building the Bridge**



“

**“Without data you are just another
person with an opinion.”**

W. Edwards Deming



Erin Troia,

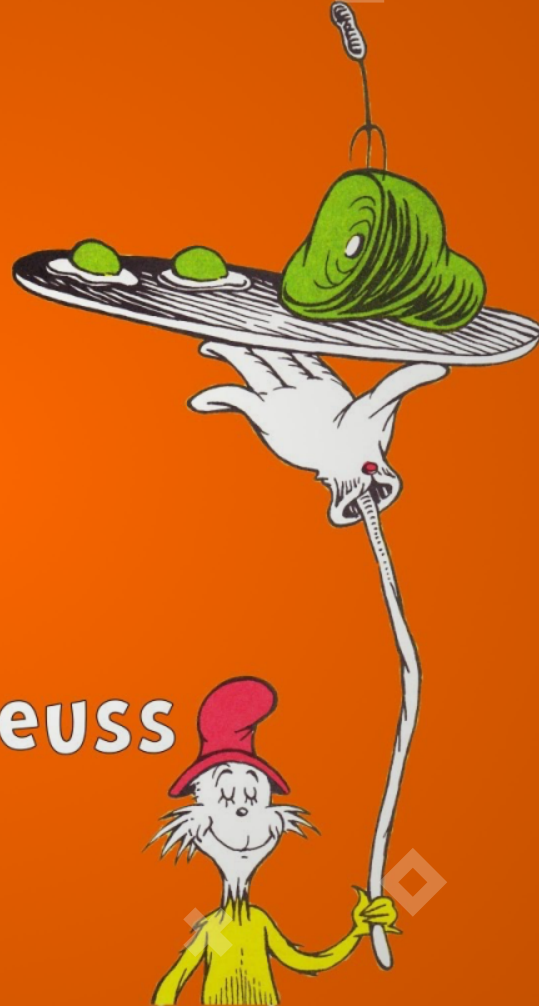
Senior Vice President at the Munshine Group

Erin is a puzzle solver. Her ability to listen and quickly prioritize, has allowed her to significantly impact fundraising growth across organizations, breakdown and revitalize data systems, and exceed annual revenue goals. Throughout her eighteen years of nonprofit management experience she has brought creativity, energy and analytical skills to those organizations she has had the opportunity to serve.



Green Eggs and Ham

By
Dr. Seuss



Do you like Green Eggs and Ham?

Fears are
Common

How do we change
the way we think?

Where do they
come from?





*I do not need
them here, there
or anywhere.*

**Myth #1: Data is not why they
hired me and “they” know it.**

Myth #1:

Data Nerd vs. Fundraiser

- × We need a translator: *data people are not fundraisers and fundraisers are not data people*
- × Translation tactics
- × Bridging the gap = HOW TO
- × Small steps, not leaps
- × Getting ready in the morning





*They do not
fit inside my house.*

**Myth #2: We are too small
to need heavy metrics.**

Myth #2:

Small shops don't need metrics

Critical Metrics:

- × Funds raised vs. Last 3 Years
- × Goal vs. actuals on all initiatives
- × Annual Giving Watch List
- × Annual Giving Targets vs. Actuals
- × Annual Giving Pyramid
- × Major Gift Pyramid
- × Campaign Capacity Rating
- × Donor Assignments

Secondary Metrics:

- × Donor #s vs. Last 3 Years
- × Monthly Growth vs. Last 5 Years
- × Annual Giving Appeal Analysis
- × Annual Giving Donor Type
 - Increase
 - Decrease
 - New
 - Renewal
 - Lost
- × Major Gift Pledge Expectations





*I do not need them
with a fox.*

**Myth #3: Major gifts is
all about relationships.**

Myth #3:

I need to visit, Not track!

Primary Goal



To ensure donor relationships remain positive and rewarding.

Best Practices



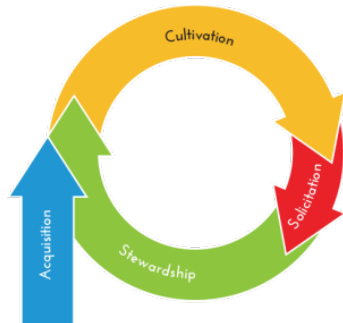
- × Track relationships
- × Increase predictability
- × Determine appropriate ask
- × Provide benchmarks

System Outcomes



- × Accountability for staff and volunteers
- × Coordination of outreach to prospects
- × Creation of a historical record

Stages



Contact Reports



Only substantive contacts reported in the official record. Other outreach should be included in your system, but not coded in the same fashion as face to face visits.

Meeting Topics



- × Bi Weekly: Pending Gift Requests/ Outstanding Proposals/ Visits
- × Monthly: Staff and Volunteer Assignments/ Reassignments
- × Quarterly: Update of target ask amounts and stewardship review



*Would you?
Could you,
in the dark?*

**Myth #4: You need a PhD in
mathematics to understand it all.**



Myth #4:

Data is TOO COMPLICATED



- × Take the Database Tour
 - Where things live
 - What terms are used
 - WHY do we have this process?
 - Send yourself to training
 - Respect the timetables
 - One bite at a time
- × Strongest Predictors of Giving
 - Giving to you
 - Giving to others
 - Stock portfolio
 - Foundation board membership
- × Bad Data
 - Internal processes
 - External screenings
 - Historical record



Eat them!
Eat them!
Here they are!

**Myth #5: We are only doing
this because the board says
we have to.**



*Try them! Try them!
And you may.*



**Now
What?**

Try Them, Try Them and You May: The Benefits of Data

Annual
Giving
Growth

Major Gift
Metrics

Comparative
Analysis

Donor
Accountability



What can you do today?



An HONEST look at
your Database



STOP:
Top 3 Things

Fundraising is not a
Democracy



What comes first,
second and third?

