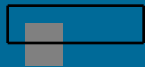


4 Steps to Turn Data Into Dollars

Wednesday, June 15, 2016
12:00 pm CST



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Who We Are



Judy Gadiel
Senior Consultant



Laura Ford
Senior Associate Consultant

Introduction

- Relationship-based Fundraising – an overview
- Building Constituent Profiles
- Effectively Using your Data
- Analyzing and Evaluating Success



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Glossary:

- **Constituent** – anyone in the database
- **Donor** – anyone who has made a donation
- **Prospect** – anyone you'd like to turn into a donor
- **Contact** – a touch point with a constituent



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STEP 1

Relationship-based Fundraising



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Relationship-based Fundraising (vs. Transactional)

- Identifying those with the financial capacity to make a contribution is one thing
- Finding the ones who believe in what you do and trust your leadership is another



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Relationship Based Fundraising (vs. Transactional)

Objective:

- Find people who believe in what you do, engage them in your efforts, and build a lasting relationship



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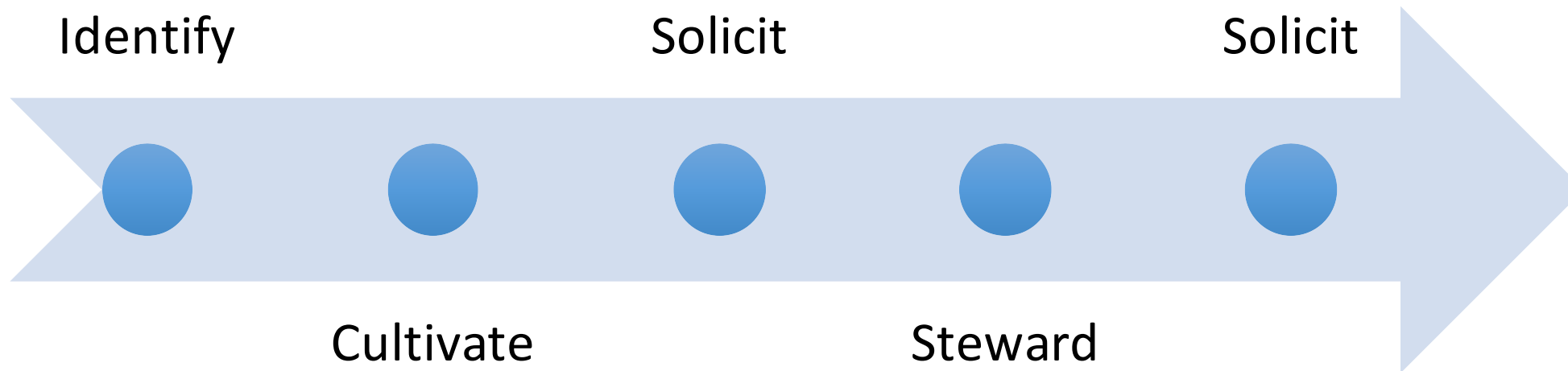


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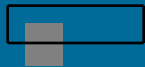
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The Life Cycle of a Donor



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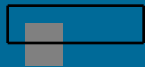
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Moves Management

A series of contacts over time
that aim to move the prospect
from *awareness* to
commitment



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Cultivation & Stewardship

Individual Cultivation Plan - Solicitor Name: _____

Opportunities for Engagement	Prospects		
	Sarah Wells	Adam and Lisa Klein	Mr. Redd
Take out for coffee			
Include personal note with newsletter			
Invite to tour space and meet staff			
Write personal note in event invitation			
Invite to event as your guest			
Email client story and picture			
Send birthday card			
Set-up meeting with ED			
Invite to join committee			
Invite to parlor meeting			



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Personalize

- **Personalize, personalize, and personalize!**



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Personalize



Donate Now ►

Dear Aaron,

Each year we distribute more than \$200,000 in financial assistance so that **every child who wants to spend a summer at camp has the opportunity to do so**, regardless of a family's finances. Your support makes this possible.

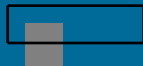
Aaron, if you have already made a gift this year to OSRUI, on behalf of the board, staff, campers and families, we thank you. If you have not yet done so, there is still time to support OSRUI. **Please [make a contribution today](#)** and help send a child to OSRUI.

Roots to grow. Wings to fly. Friends forever.
This is OSRUI.

Thank you for your generosity,



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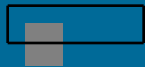
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Personalize

- Personalize, personalize, and personalize!
- **Personal hand written notes**



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Personalize



ILLINOIS MEDICAL DISTRICT
Guest House

Karla,

I hope you will join me in supporting IMD Guest House again this year. Your support means the world to us!

Warmly, Julie



ILLINOIS MEDICAL DISTRICT
Guest House

Sam,

It was great to see you and Steve at the Open House. I hope you will both join me in supporting IMD Guest House with a donation this year.

Best, Evan



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Personalize

- Personalize, personalize, and personalize!
- Personalize hand written notes
- **Personalize collateral materials**



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Personalize

Phil and Claire Dunphy
10336 Dunleer Drive
Los Angeles, CA 90064

modernfamily

Thank you for supporting the 2014 campaign with a gift of \$500. Please consider a gift of \$550.

I/We would like to support Modern Family with a gift of:

☐ \$100 ☐ \$250 ☐ \$500 ☐ \$750 ☐ \$1,000 ☐ Other _____

NAME: _____

ADDRESS: _____ EMAIL: _____

CITY: _____ STATE: _____ ZIP: _____ PHONE: _____

☐ A check is enclosed.

☐ Visa / MasterCard / American Express # _____ Exp. Date _____ Security Code _____

☐ Please contact me about my company's matching gift program.

For purposes of donor recognition, please list name(s) as: _____

Signature: _____

Thank you for your support. Please return to: Modern Family • P.O. Box 123 • Los Angeles, CA 90064 • www.modernfamily.com YE2015



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Segmentation

- By constituent group
- By generation
- By giving level



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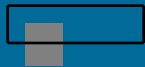
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STEP 2

Building Constituent Profiles



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Getting to Know Your Donor

O-T
I-L

II-7
M-P

Name _____

Telephone (_____) _____

Fax No. (_____) _____

E-mail _____

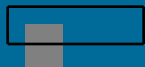
Address _____

Cell No. (_____) _____

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The Basics

Academy of the Stars

Hunter Williams | [My profile](#) | [Settings](#) | [Help](#) | [Sign out](#)

Home | **Constituents** | Fundraising | Activity | Documents | Settings

All constituents | List Manager | Duplicates

Search constituents

Constituent Details ?


Constituents > Anthony Soprano / Actor @ The Sopranos

Individual details: Soprano, Anthony

ID: 941704

Name Information

Addressee/Label Name	Salutation	Annual report name
Anthony Soprano	Anthony	Anthony Soprano
Alt. addressee	Alt. salutation	Honorary name
Mr. and Mrs. Anthony Sporano	Tony and Carmela	None defined
Spouse/Partner	First name	Last name
Carmela	Anthony	Soprano
Employer	Job title	Birthday
The Sopranos	Actor	N/A



Change picture

MailChimp Information

MailChimp Status

Subscribed

Categories

Contact Type	Capacity	Interest
Primary	High (> \$10K)	Low
Groups	Tags	
Friend	Golfer	

Show all categories

Related Information

Relationships

Soprano, Carmela (Ex-Wife)

Soprano, A.J. (Son)

Barone, Raymond (TV Dad club)

Soros, George (Distant Cousin)

Appleton, Larry (Gave gift membership)

Show all relationships

Class Years

Student, 1978

Parent, 2012

Parent, 2014

Giving Summary

Total	\$107,680
Largest	\$50,000 on 2011-08-08
Latest	\$25,000 on 2012-08-08
First	\$120 on 2008-05-22
Gifts	21 / \$104,030
In Kind	1 / \$500
Soft Credits	3 / \$650
In Honor of	1 / \$2,500
Goals	2 / \$7,500
Status	Active Donor , Top 100 Donor

Volunteering

Total	5.0 hours
Committed	0 hours
Outstanding	0 hours

Contact Information

Phone Numbers

work

888-555-0064

Email Addresses

work


soprano@thesopranos.com


Mailing Addresses

home

1235 North Blvd

Seattle, WA 98115

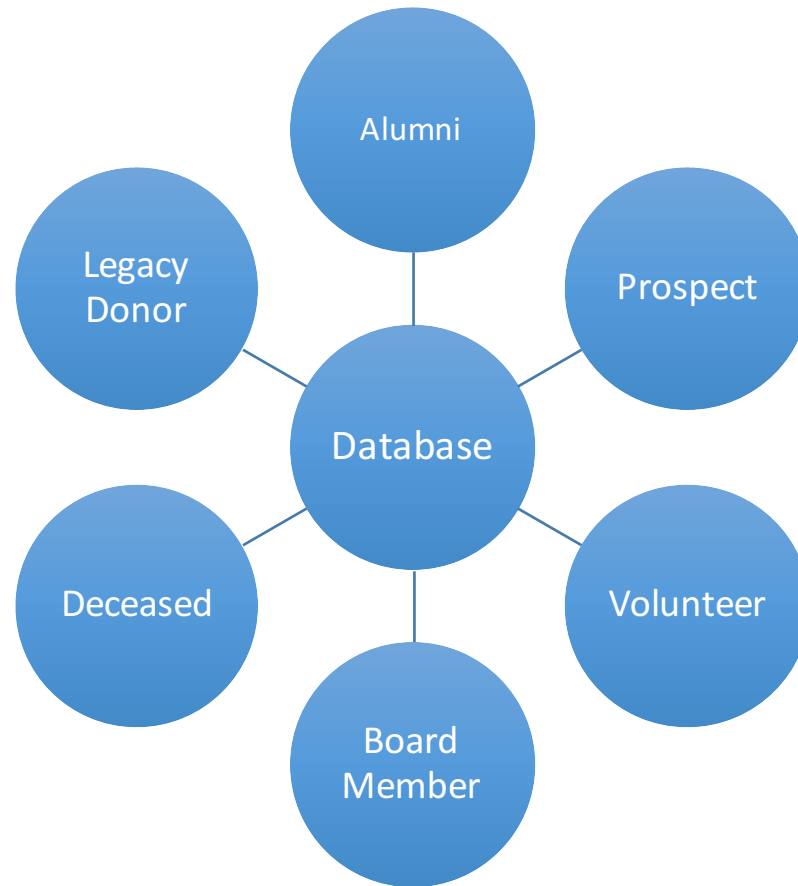
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Other Data to Collect: Constituent Type



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Other Data to Collect:

Contact Preferences

- ✓ Do Not Mail: _____
- ✓ Preferred Email: _____
- ✓ Preferred Phone: _____
- ✓ No Phone Calls: _____
- ✓ Text Messages: _____
- ✓ In Person Visits: _____



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STEP 3

Effectively Using Your Data



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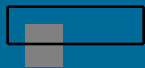
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Why Data Management Matters

- Prepare your leadership



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Prepare Your Leadership



Leadership Contact: Laura Ford

Anthony (Tony) Soprano

- President of The Sopranos LLC
- Lives in New Jersey
- Spouse is Carmela – it was her birthday last month, daughter Meadow is starting college this year
- The Sopranos were title sponsors of the 2016 annual gala
- Last Gift: \$1,000,000 for capital campaign
- Ask amount for annual: \$100,000
- Last meeting notes: Laura Ford, 6/13/16 Had coffee with Tony and discussed the need for funds to bring an Italian cohort to the United States for a cultural exchange and musical tour. He was interested but would like to know more about where the kids will come from and the itinerary when they are here



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Why Data Management Matters

- Prepare your leadership
- **Professionalism**
 - Efficient information sharing
 - External perception



Professionalism

Contact report for 'Marcy Boroughs' on 2010-04-05

Constituent Marcy Boroughs	Contact Type ✓ -- choose one -- Call Email Meeting Letter Proposal Other	Date of contact 2010-04-05 YYYY-MM-DD	Team Member Nick B.
Result <div></div>			
<input checked="" type="checkbox"/> Include content in notification email?			

Why Data Management Matters

- Prepare your leadership
- Professionalism
 - Efficient information sharing
 - External perception
- **Close the circle**

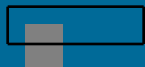


Close the Circle: Reporting Back

The screenshot shows a web application interface for a 'GUCI Donor and Prospect Visit Report'. The top header is dark blue with the title 'GUCI Donor and Prospect Visit Report' on the left, and icons for palette, eye, and settings on the right, followed by a 'SEND' button. Below the header, there are two tabs: 'QUESTIONS' (active) and 'RESPONSES'. The main content area has the title 'GUCI Donor and Prospect Visit Report' and a subtitle 'For GUCI staff and leadership to complete following a contact (call, visit, solicitation) with a donor or prospect'. The form includes a 'Contact Date' field with a 'Short answer text' input. Below this is the 'Contact Type' section, marked with a red asterisk, featuring two radio button options: 'Telephone' and 'Visit'. On the right side of the form, there is a vertical toolbar with icons for adding content (+), text (Tt), image (img), video (play), and a list icon.



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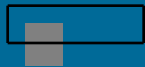
QUICK TIPS!

Create a handbook:
Policies
Procedures
Glossary

Allocate a database manager:
1 person responsible for data entry



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STEP 4

Analyzing and Evaluating Success



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Monitor Activity

FY14 Department Activity Overview			
FY14 Gifts	Goal	Actual	Achieved goal?
Major donors	45	43	FALSE
Low-level donors	216	216	TRUE
Corporations	28	17	FALSE
Foundations	22	10	FALSE
FY14 Activity Overview			
	Goal	FY14 Actual	Variance
Total Calls	1065	762	-303
Total Meetings	240	207	-33
Major gift asks	80	50	-30
Major Gifts	45	43	
Low-level asks	-	-	-
Low-level gifts	216	216	0
Corporate asks	49	26	-23
Corporate gifts	28	17	-11
Foundation asks	34	14	-20
Foundation gifts	22	10	-12
Total Asks	163	90	-73
Total Gifts	95	70	-25



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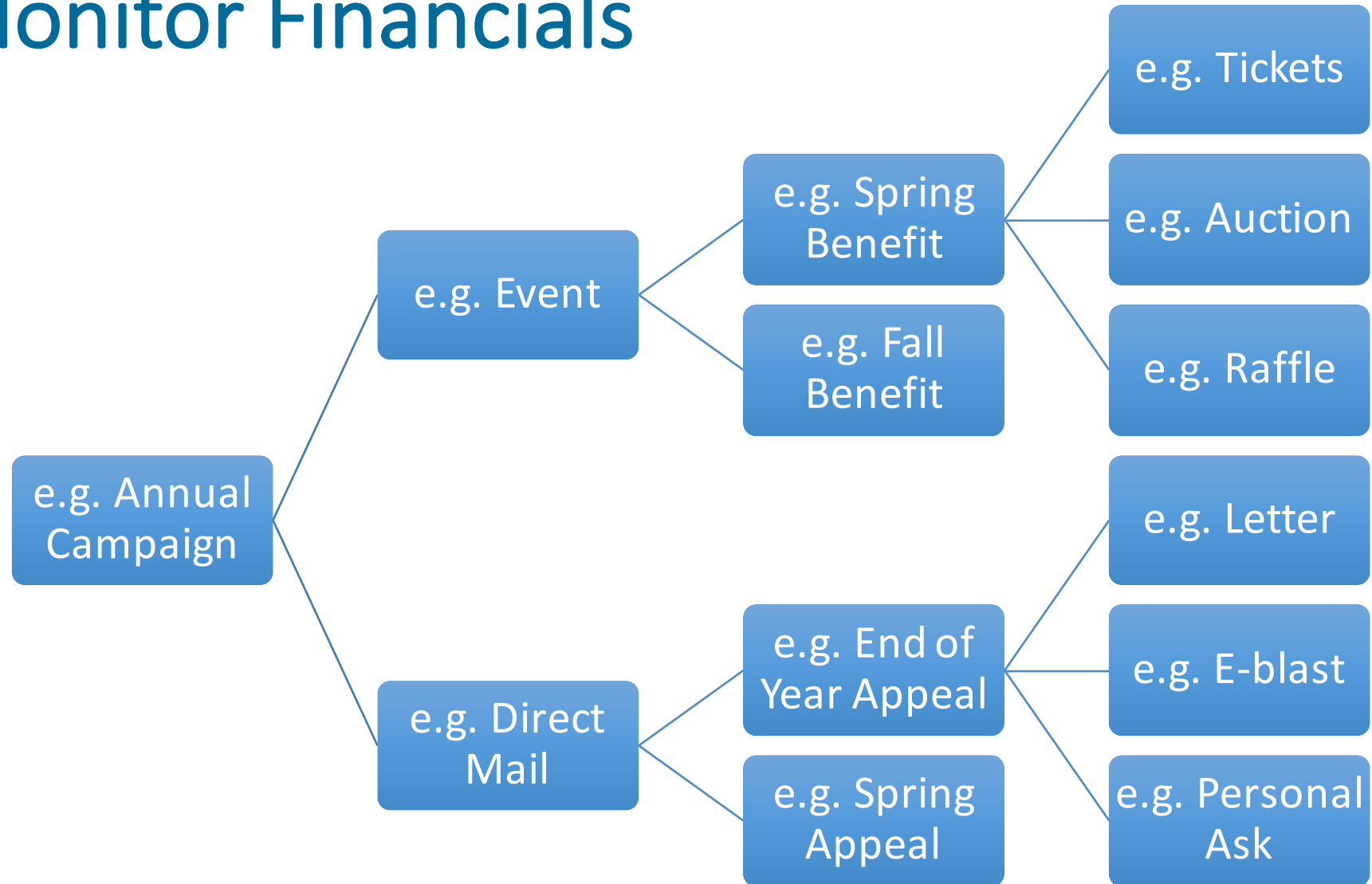


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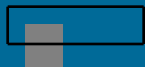
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Monitor Financials



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Evaluate

End of Year Appeal YOY Comparison					
Income vs. LY	2014	2015	Variance	Growth	Notes
Total Annual Campaign	\$232,111.00	\$269,096.29	\$36,985.29	16%	
End of Year Gross	\$35,423.00	\$85,624.00	\$50,201.00	142%	
End of Year Expenses	\$6,014.80	\$6,077.95	\$63.15	1%	2014 -c. 4,500 letters, 2015 - c.9,000 letters
End of Year Net	\$29,408.20	\$79,546.05	\$50,137.85	170%	
Average Gift	\$112.81	\$428.12	\$315.31	279%	
Total Donors	128	200	72	56%	
Donor type/letter received 2015	Number of donors	% of total donors	\$ received	% of total income	
Alumni	37	19%	\$13,120	15%	4920 letters sent
Community	148	74%	\$32,644	38%	4371 letters sent
Parent	10	5%	\$1,601	2%	228 letters sent
Rabbi	4	2%	\$826	1%	198 letters sent
With leadership contact	41	21%	\$14,272	17%	
New to End of Year appeal	104	52%	\$18,981	22%	
Board participation	Number of board donors	% of total board members	\$ received from board	% of total income	
Board	20	57%	\$34,366	40%	% of total board members participated



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Summary

- Relationship-based Fundraising
- Building Constituent Profiles
- Effectively Using your Data
- Analyzing and Evaluating Success



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Thank you!

Questions? Please contact us:

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