

Defining the Donor: Using Your Data to Build Better Constituent Relationships

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Tell Us About You

- Use Formal Database
- Use Excel or Paper Files
- Solely Responsible for Data Activities
- Have Assistance or Support for Data Activities



Where do I begin?



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Where do I begin?



- Generate a list
 - ✓ Gift Amounts and Gift Dates

- Screen list
 - ✓ Use screening service if possible
 - ✓ Use Board or Volunteers IN CONFIDENCE

- Sort list into groups
 - ✓ By Location, by gift amount, by involvement

- Determine how to approach each group



Define Your Goals and Objectives

➤ Major Gifts

- Focus on donors and prospects that share passion for the mission
 - ✓ Data finds prospects through RFM
- Execute and maintain a solicitations program
 - ✓ Data tracks prospect through the continuum of solicitation



Define Your Goals and Objectives

➤ Annual Fund

- Focus on lifetime value and invest in your most passionate donors
 - ✓ Total giving amount over a period of time
- Acquire more new donors to compensate for donor attrition
 - ✓ Identify new donors and new gifts
- Donors who haven't renewed or been retained
 - ✓ Lapsed time since last gift



Data Clean-Up

- ✓ Data Must be Meaningful and Maintainable
- ✓ What Comes Out Depends Upon What Goes In

KEEP
CLEAN
AND
CARRY
ON



Data Clean-Up – “Clean” Means:

- Complete Information in Key Fields
 - ✓ Addresses, titles, codes, etc.

- Appearance
 - ✓ Sentence case vs ALL CAPS or all lowercase

- Gift Entries
 - ✓ Campaign, Fund, Appeal coding

- No Duplicate Records



Data Clean-Up – Key Concepts

- Periodic Quality Control Checks
 - ✓ Use queries or sort manual lists to review information

- Consistency
 - ✓ Reduce number of choices on can enter from tables

- Limited Access/Security
 - ✓ One person should be the overseer of the data

- Staff Training and Documentation



Dive In and Analyze Your Data



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Dive In and Analyze Your Data

➤ Generate and Sort Lists

- Donors
 - ✓ Gift Amounts
 - ✓ Wealth Screening Indicators
 - ✓ Giving Society Members
 - ✓ Event Attendees

- Demographics
 - ✓ Location
 - ✓ Age
 - ✓ Gender
 - ✓ Areas of Interest





- What Segments Bubbled to the Surface?
- Moves Management Strategy
- Cultivation and Engagement
- Measurable Outcomes

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Remember...

- Change is imminent. Data changes, donor relationships change. You need to change too.
- Data must be meaningful and maintainable.
- Crucial to keep your data clean and up-to-date.
- Time is everything; spend your time with the right people.
- Don't let data scare you; it can only help you.



Questions/Contact:

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