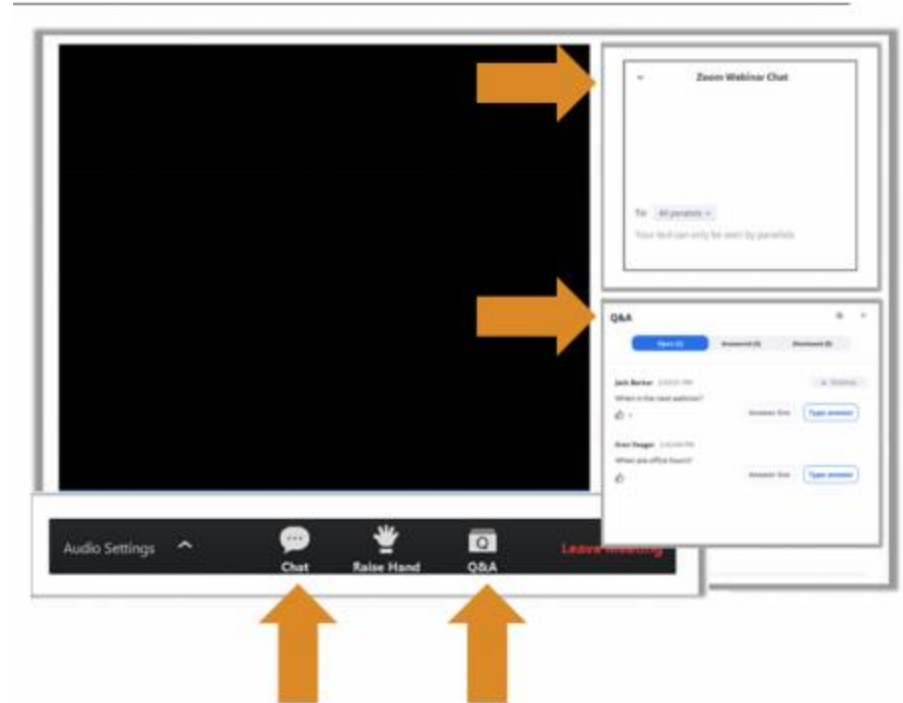




HOW TO USE YOUR NONPROFIT'S DATA TO TAKE YOUR ONLINE FUNDRAISING TO NEW HEIGHTS

Housekeeping

- This session is being recorded and **will be made available to you** after the webinar
- Please submit questions using the **Q&A tool** in your Zoom panel; watch for comments from us in the Chat tool



Today's speakers



Kimberly O'Donnell
Chief Fundraising Officer and
SVP, Professional Services
Bonterra



Mark Becker
Founding Partner
Cathexis Partners

About Bonterra



CyberGrants 

 everyaction

Network  for Good™

 Social Solutions

GiveGab  salsa

 DONORTRENDS

 Mobilize

 ActionKit

Corporate Social Good
& Philanthropy

Nonprofit Fundraising
& Relationship Management

Case Management

are coming together as



We power those who power social impact.

About Bonterra



Greater Impact, Greater Good

Intuitive tech to help you work smarter

Expertise to advocate for and champion the doers to elevate your social impact

Deep knowledge of the social good space to work in partnership and help you thrive

19,000+
customers, including
15,000+
nonprofit organizations



40 MILLION+
lives touched through our case management platform



In 2021 Alone:

225,000+
nonprofit organizations received funds



50%+
of Fortune 100 companies



\$7.4 Billion +
given to nonprofits across our solutions

About Cathexis Partners

We help nonprofits use technology to raise funds and engage supporters effectively and affordably.

virtual team = low overhead = affordable prices

14

years

1000+

nonprofits served

2500+

projects completed

20+

team members

Overview

- Determining your approach to reporting and analysis
- 5 tips for analyzing your online fundraising campaigns
- 10 ways to use data to improve your future online fundraising campaigns
- 6 tips for keeping your donor data clean and ready to use

DETERMINING YOUR APPROACH

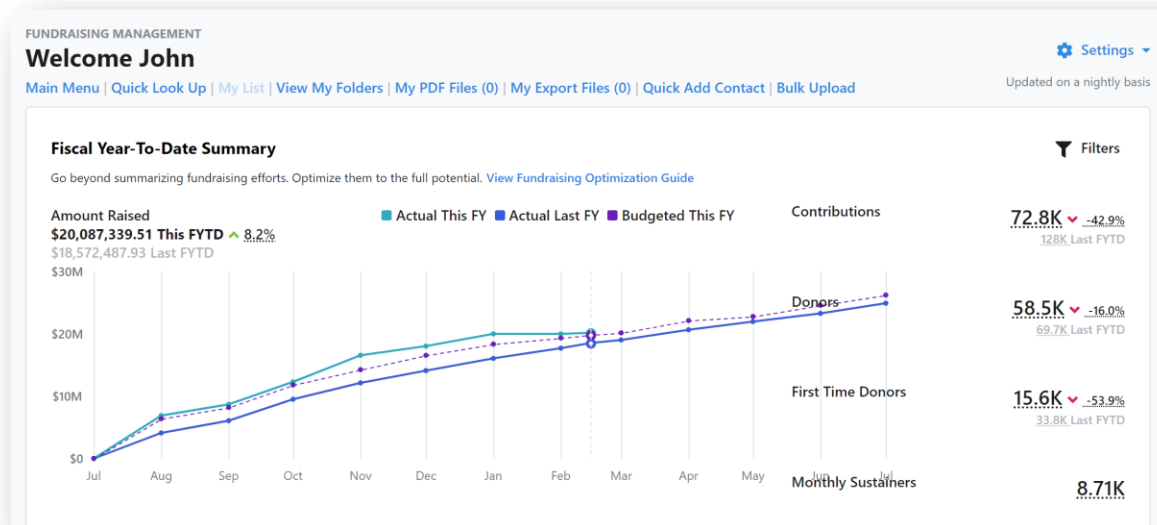
Think about your approach

- What are your data analysis goals?
- What data will inform your analysis?
- How will you access that data and put it to use?



Consider how to access your data

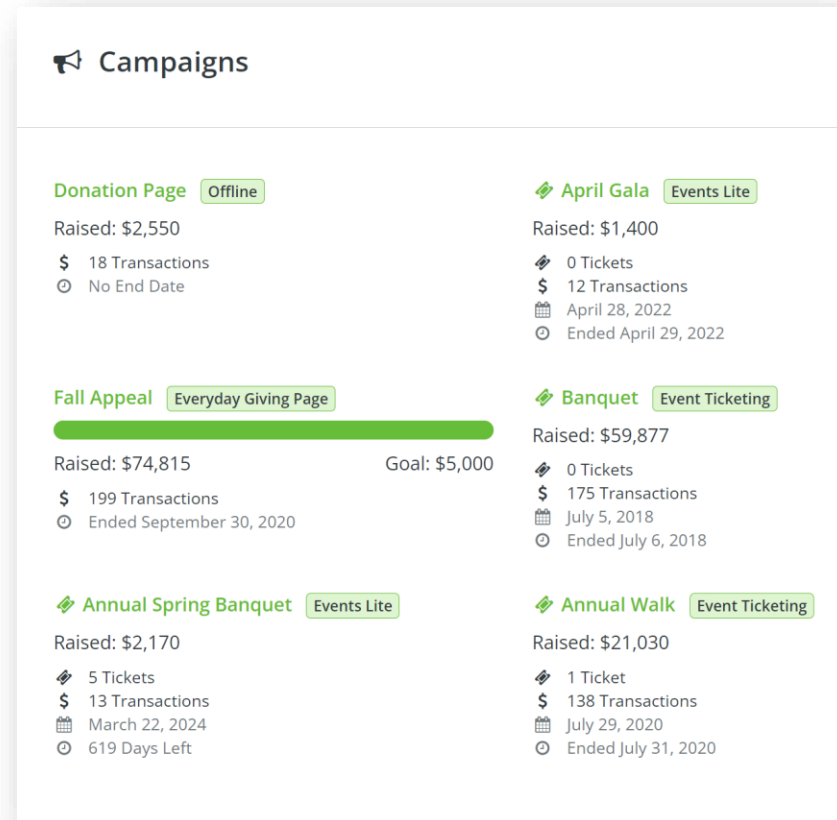
- Set up dashboards and reports
- Focus on campaign objectives and sharing
- Augment your data, if needed



5 TIPS FOR ANALYZING YOUR CAMPAIGNS

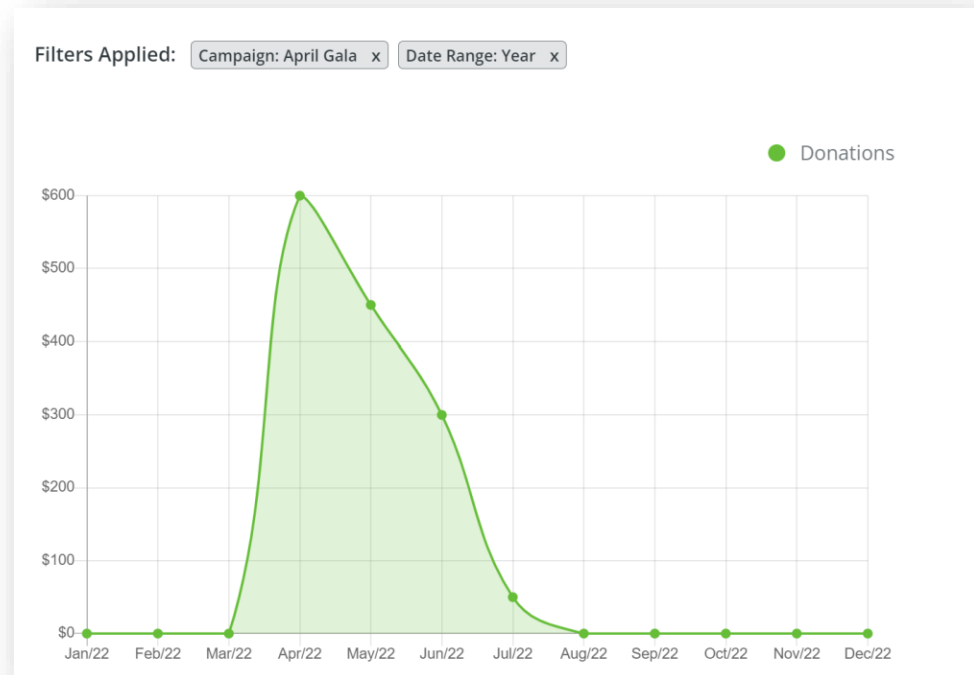
Why analyze?

- Track campaign results & tweak to optimize results
- Understand campaign performance
- Establish benchmark data for future comparison



1. Analyze during the campaign

- Don't wait until it's over
- Review results regularly (weekly, monthly)



2. Review final results

- How did the campaign/event results compare with the goals you set?
- What goals were too low or too high, and why do you think that was the case?
- How effective were your various marketing efforts?

3. Consider other factors

- How much **staff** effort did it take?
- What did **participants, attendees, and donors** like/dislike about the campaign or event: registering, fundraising, giving, and the campaign/event itself?
- Were the campaign website and fundraising tools easy to use for **participants, donors, and staff**?

4. Debrief with your team

- Review campaign goals
- Discuss results
- Consider lessons learned
- Take notes so you can look back on them

5. Think about the next campaign

- **Not as successful as you'd like?** Maybe change timing, messaging, or structure of the campaign.
- **Met your goals?** Maybe focus on raising more next time by making sure you aren't leaving money on the table.
- **Huge success?** Maybe focus next on recruiting more sponsors, attracting more peer-to-peer participants, or getting more donors to donate again and at an even higher level.

10 WAYS TO USE DATA TO IMPROVE FUTURE CAMPAIGNS

1. Decide when to start



- When did event attendees register?
When did donors contribute?
- Start marketing your campaign around this time

2. Determine where to focus

- Use source codes
- Attribute registrants and donors to specific marketing channels
- Decide which channels are worth keeping



3. Target your email audience

- Segment audiences
- Use appropriate messages for each audience
- Add personalized notes to your emails
 - “Thank you for [donating/fundraising] \$X last year.”
 - “Thank you for being one of our top XX [donors/fundraisers] last year.”
 - “Last year you ran X:XX in our 5K and took Xth place. Are you ready to do it again?”



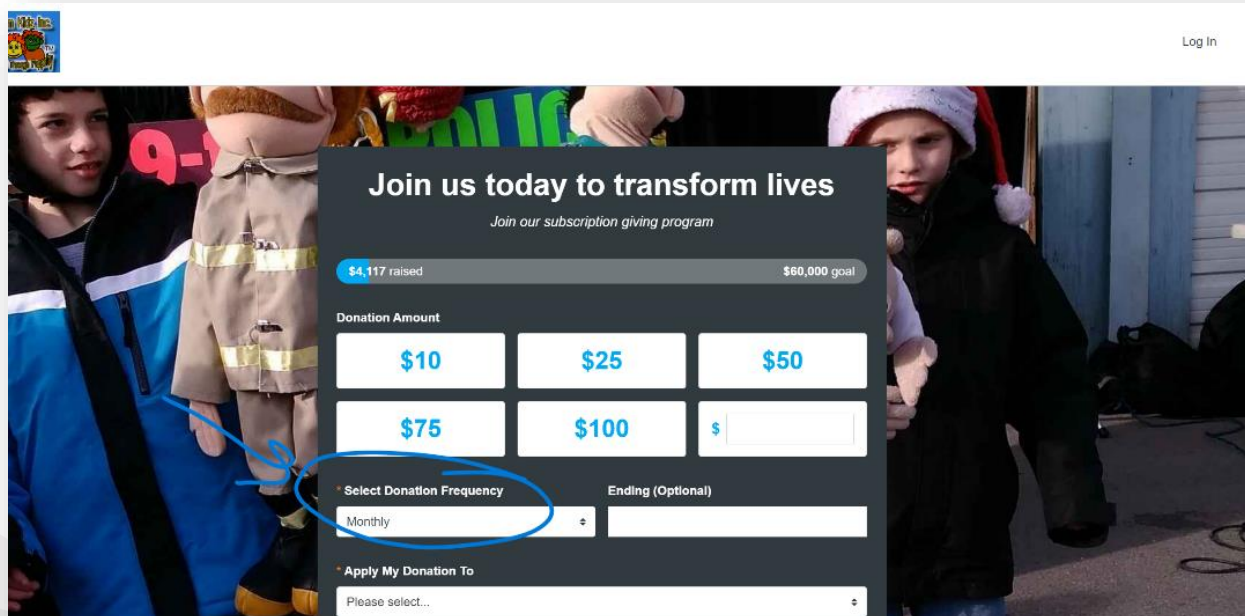
4. Make your campaign more compelling

- Add compelling data from past campaigns
- Example:
“Last year we raised \$X million dollars. With that money we were able to fund XX research grants. So far, those grants have produced XXX hours in the lab, which resulted in X new clinical trials set to launch in Q1 2023.”



5. Check your ask levels

- Adjust ask levels based on average gift size to encourage more and larger donations
- Start with the smaller amount first as the first option
- Set your default for “Subscription Gifts”



Kingdom Kidz

6. Use dynamic asks

- Automatically specify ask levels based on each donor's previous donation level

Smart Link ✕

Suggested Amount
Highest Previous Contribution (HPC) ▾

Minimum/Default Amount *	or HPC x	Multiplier ? *	
<input type="text" value="20.00"/>		<input type="text" value="1"/>	
<input type="text" value="35.00"/>		<input type="text" value="1.25"/>	Remove
<input type="text" value="50.00"/>		<input type="text" value="1.5"/>	Remove
<input type="text" value="100.00"/>		<input type="text" value="1.75"/>	Remove
<input type="text" value="500.00"/>		<input type="text" value="2"/>	Remove

[+ Add another link](#)

Other Amount (recommended)

7. Tie dollars to real items

The screenshot shows a navigation bar with links for 'About Us', 'Support Us', 'Admissions and Student Services', and 'News and'. Below the navigation bar are four donation cards, each with an icon and a 'Join Now' button.

Donation Level	Amount	Benefits
Working Dog	\$100/Month	Your support of at least \$100 a month will help provide critical resources and training for both our dedicated Guide Dogs and their worthy recipients as they begin their lifelong journey. And you'll receive a complimentary GDD "These Paws Have Power" Sweatshirt and a GDD plush dog Lab or Poodle.
Top Dog	\$50/Month	Your support of \$50 a month will help us continue to provide mobility, companionship and independence for our blind and visually impaired clients, and you'll receive a complimentary GDD
Leader of the Pack	\$30/Month	Your support of \$30 a month will go a long way to helping us meet our mission, and you'll receive a complimentary insulated GDD tote!
Tail Waggers	\$10/Month	Your support of \$10 a month will help us continue to meet our mission, and you'll receive a complimentary Lab Notes note pad & GDD pen!

Guide Dogs of the Desert

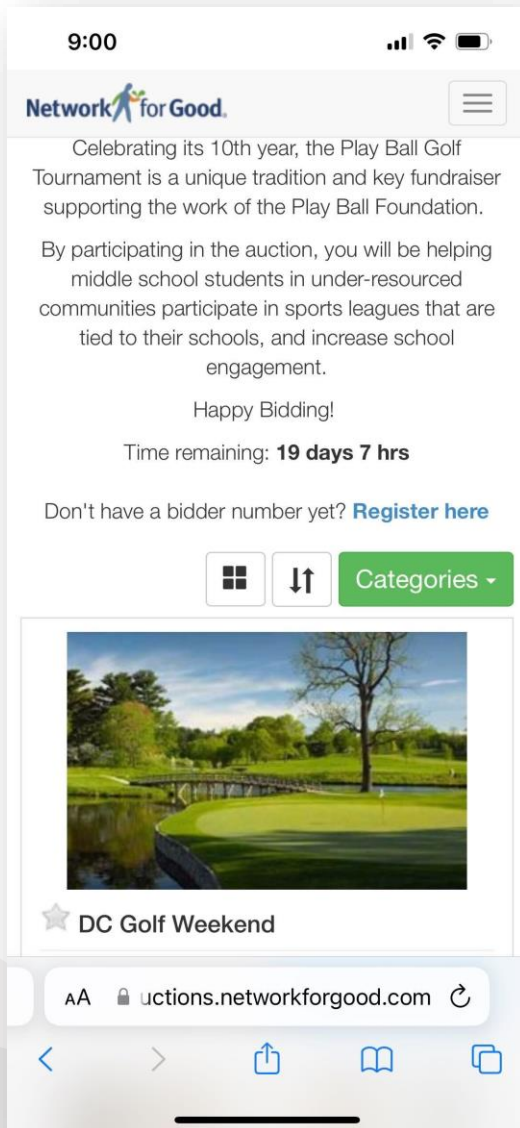
- Association donation levels with what funds will provide
- Example: Letting supporters know that their donation will help feed a family of four or send a child to school for a year is more impactful than simply asking for a specified amount of money

8. Reconsider p2p incentives

- Adjust peer-to-peer fundraising incentives
- Test more effective communications to encourage participants to reach goals



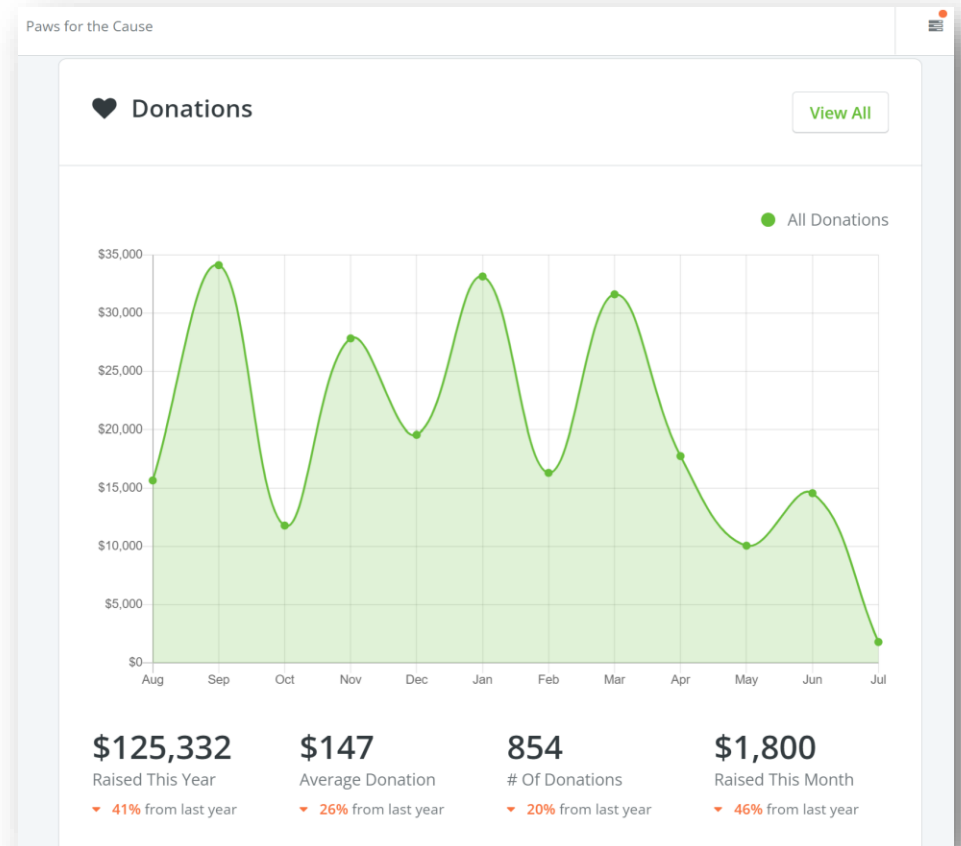
9. Improve the event day experience



- Use technology that makes it seamless for guests
- Collect additional contact information and/or opt ins

10. Decide if your campaign is working

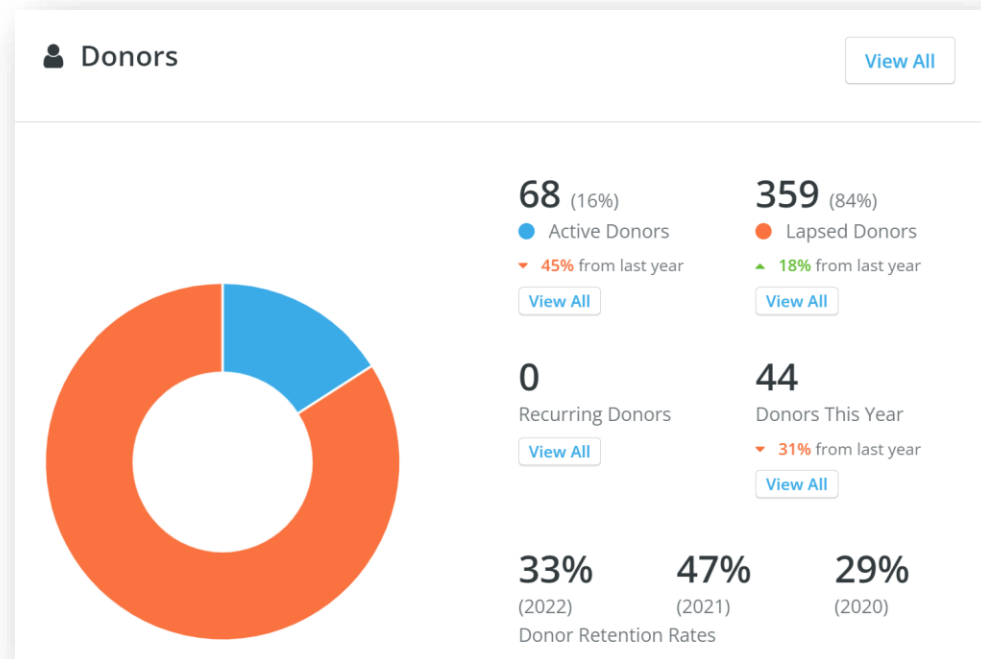
- What if this was your dashboard?
- Where would you start first?



KEEPING YOUR DONOR DATA CLEAN: 6 TIPS

1. Think about who needs what data

- Consider each role in your organization; example:
 - Board members
 - Development team
 - Donors
- Think about what data points are important to collect, update, and access



2. Decide how often to clean it

- Often enough that it doesn't pile up; not so often that too few records need updating (it has to be worth your time to do it)
- Start weekly, then every two weeks, then once per month, etc.
- One-offs – Example:
If you have a large or important mailing going out

3. Review tables, queries, reports, exports

- Inactivate erroneous table entries
- Use a query to find and delete these entries from constituent records if they no longer have value
- Periodically review query file
 - Look for global changes more than 30 days old.
 - Look for queries that haven't been run in past 12 months.
 - Repeat for reports and exports.

4. Update your database policies

- At least annually
- Be sure to include naming standards to make searching and reporting easier, more accurate
- Notify organization of any changes and document

5. Keep staff well educated

- Data integrity issues might indicate:
 - a need for more training
 - a need to adjust data entry procedures

6. Revisit your onboarding checklist

- Data permissions/access needed to do their jobs
- Username and password policies
- Training session to go over policies and procedures
- On the flipside:
Remove staff members from your systems when they leave your organization

Free resources



[Cathexispartners.com/resources](https://cathexispartners.com/resources)

Check out e-guides from EveryAction and Network for Good:

<https://go.everyaction.com/nonprofit-fundraising-now-next-year-next-decade-download-now.html>

<https://www.networkforgood.com/resources/guides-templates/>

Take a product tour of the EveryAction platform: <https://app.getreprise.com/launch/AX5PKjn/>

Questions?

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mark@cathexispartners.com

Thank you!