WHAT'S DATA GOT TO DO WITH IT?

◎ **A BEGINNER'S GUIDE TO #DATA & #FUNDRAISING**

JustGiving™

SOCIAL MISFITS MEDIA

Institute of Fundraising

PREFACE

What's data got to do with it? In the past few years, we've begun to see just how powerful data is – how it can help businesses think strategically, refine activities and be more effective (and more profitable).

Data is revolutionising our online lives and the ways we interact with brands, and the for-profit world has caught on to this in a big way - but we are only seeing a few good examples in the charity and non-profit sector. That's why we've created 'What's Data Got To Do With It?' We want to inspire those charitable organisations who have yet to embark on their journey with data and fundraising to start, by providing insights, case studies and resources to guide them through the process and help them reach their full potential.

Ultimately, using data will help future-proof your organisation by helping you preserve valuable resources and make informed choices. 'What's Data Got To Do With It?' has been designed as a roadmap for charities and social enterprises to begin on the path to better data collection, analysis, implementation and internalisation.

Data can help you raise more money, get the most out of a campaign or initiative, and – most importantly – tell you what your supporters really want from you, so that you can refine your engagement with them and build longer-lasting relationships; relationships that, ultimately, help you have a greater social impact! Hopefully, you'll find ideas in this guide that will inspire you to begin using data more effectively.

We wish you the best on your data and fundraising journey and do let us know your thoughts by tweeting us **@MisfitsMedia**, **@JGCauses** and **@ioftweets**. Thanks and enjoy!
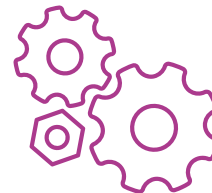
Carlos Miranda
Founder
Social Misfits Media

Anne-Marie Huby
Co-Founder & MD
JustGiving

Daniel Fluskey
Head of Policy and Research
Institute of Fundraising

02

CONTENTS

EXECUTIVE SUMMARY

For fundraisers, the increasing availability of data enables us to understand our donors more than ever before. It also helps us build stronger, longer lasting relationships and ultimately increase our revenue, thus, allowing our organisations to better achieve their social or environmental missions.

'What's Data Got To Do With It?' can help guide you through the process of using data strategically as part of your fundraising strategy. We outline four steps to using data to better understand your supporters, raise more money and further your charitable goals.

ANALYSING
02

- Data analysis creates insights that help tailor your content and set realistic goals.
- Expertise is crucial – safeguard your organisation through training, or by hiring a data analyst. Bad analysis can be damaging.
- Ask questions of your data – who are our supporters? What do they respond to?
- Put findings into context to understand what the numbers really mean.

COLLECTING
01

- Make sure that the data you collect is accurate, consistent and intentional.
- Decide exactly what you want and need to know before collecting data.
- Collect demographic data, contact information, and data about the actions your supporters take.
- Make it easy on supporters – remember that you don't need to ask people everything about themselves at once.

IMPLEMENTING
03

- Once you've analysed the data, use it.
- Apply what your data has told you to future campaigns and build a data-led fundraising strategy.
- Figure out what works and what doesn't by segmenting, testing, and measuring results. Did people respond the way you expected them to?
- Focus on outcomes and not just efforts – this can provide real insight and value.

INTERNALISING
04

- When you are regularly collecting, analysing and applying data, internalise it to create a culture of learning in your team.
- Consistently measure the impact of fundraising activities, and always be testing what works.
- Create a mindset that is based in learning and growth – enable your fundraising strategy to be flexible and evidence-based.

Remember: Data is an ongoing process and things won't change overnight. Gaining insight into your supporters' wants and needs takes time – both successes and failures are valuable to you as part of the learning process. What is certain is that using data effectively, methodically and with genuine curiosity will help you better understand your supporters and donors, and what they want from their interactions with you. This understanding ultimately enables you to create stronger relationships with supporters that are fruitful and lasting.

INTRODUCTION

With the constant proliferation of digital tools and channels, charities are presented with growing opportunities to reach new audiences and learn about their existing supporters. The share of money being raised online is increasing and all signs point to this trend continuing: In 2014, the average online donation in the UK was £63.29 – a growth of 20% since 2010.[1] In the United States, charitable giving rose by 2.1% in 2014, compared against the previous year, but online giving grew by 9%.[2] Social media alone provides exciting opportunities: in one survey, 79% of charities using social media for fundraising reported a rise in the funds they received in 2014, compared to the previous year.[3]

With all of the information that online channels put at charities' fingertips, the need to use data effectively has come to the forefront in the way we talk about marketing, communications and fundraising. You've likely noticed that today, our online lives are becoming increasingly personalised - when we shop, talk to friends, watch films and listen to music through platforms like Amazon, Facebook, Netflix and Spotify, we are provided with a personally tailored experience driven by our past usage, preferences and information.

This personalised service is driven entirely by data, and it has led to the rise of a more sophisticated consumer who expects to build a relationship with brands over time. Charities need to harness the power of data to create more personalised experiences for their supporters if they want to stay relevant in an increasingly data-driven world.

Currently, 44% of donors admit they have the capacity to give more than they already do.[4] Data is the most powerful tool charities have to understand who their enthusiasts are and how they can better communicate with them, in order to build more meaningful relationships that lead to loyalty and increased giving over time.

Though the majority of charitable organisations realise the importance of collecting information about their supporters, many are not using this data to its full potential. Research by the Nonprofit Technology Network (NTEN) in 2012 showed that while 99% of charities surveyed were recording some kind of donor data, just 26% were using that data to inform future fundraising decisions.[5]

In this guide, the fourth in our series, we'll talk about how charities can begin using the information available to them to bolster fundraising efforts and ultimately increase their revenue. We'll be the first to admit that data science is a vast and complex world – one that many people spend their lives studying and developing – and this guide can only scratch the surface. With that noted, we hope that this guide will serve as a practical and user-friendly entry point into a much larger world.

Why have we written this guide?

This beginner's guide to data and fundraising is designed as a roadmap for charities and social enterprises to kick-start their journey to better data collection, analysis, implementation and internalisation, so they can build stronger relationships with supporters, raise more money and further their charitable impact.

This guide exists primarily to help organisations that have either never looked at data and how it can impact their fundraising before, or have perhaps experimented with data but desire more inspiration and guidance on how to do so effectively.

We've spoken with experts in data and fundraising and with four charities that are already using data particularly well to find out what key lessons they've learned along the way. These lessons are applicable to other organisations – regardless of size, budget or cause.

Data is an important part of the future, especially in our online lives. We want to help charities begin using and internalising data as part of their fundraising strategies so that they don't get left behind.

What do we mean by 'data'?

Data is a big word, and you've probably seen it buzzing around in several different forms. 'Big data,' 'Smart data,' 'Data visualisation' – all of these variations can make collecting and analysing data a daunting task.

As Andrew Means, founder of Data Analysts for Social Good and the Impact Lab, defines it, ''Data is when thoughts, ideas, movements, words, pictures, places

and more are captured and stored in a way they can later be processed." Data, in and of itself, is not a thing – it is a process through which information is collected, stored, analysed and implemented. Andrew points out that this information is a raw resource that isn't useful on it's own – processing it, and applying tools and methods to create meaning, is what gives it value.

In this guide, we'll be focusing on donor data: information about the people who support or give to your organisation, and the actions that they take, and the process of systematically recording, storing, analysing and implementing data in order to make it meaningful.

Why are we talking about data?

Data provides evidence to support what you do. It gives you insight into who your donors and supporters are, which is crucial considering nearly half of UK voluntary organisations receive most of their funding from individuals.[6] Data can also tell you which channels and messages resonate most with your supporters – sometimes that's through demographic or behaviour-based groups (for example, finding that men who like biking generally respond better to email communications). But with the evolution of information technology we are increasingly able to employ individual marketing strategies – to tailor communication all the way down to individual preferences (such as how to get Lola or Theo to respond). In these ways, data will empower you to make educated decisions and to achieve better outcomes from your fundraising efforts.

For many charities, the time and resources needed to collect, analyse and implement data as part of the decision-making process can seem like an unaffordable luxury. In addition to stretched budgets and busy staff, it may seem overwhelming to fundraisers to deal with the sheer amount of data that exists if they feel they or their team lack the knowledge they need to get started.

Ultimately, data can help charities build stronger, longer lasting relationships with donors, raise more money and further their charitable goals. But how can you unlock that potential and employ the power of data in your fundraising strategy?
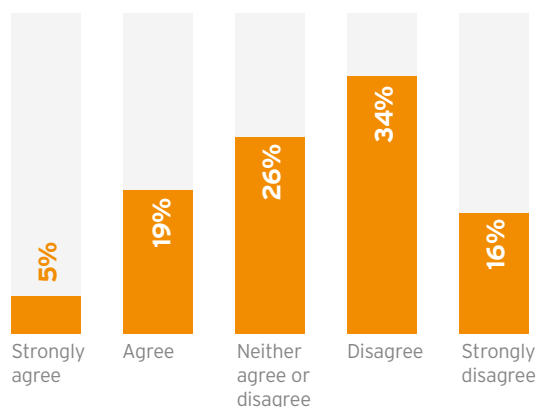
Data Survey

In June 2015, we surveyed 100 charities about the way they collect, analyse, and use data to inform their fundraising strategies.
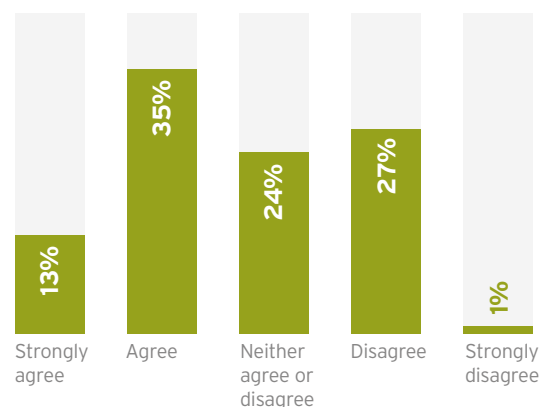
A majority of the charities we surveyed told us that they are struggling to get started:

- 57% said they find it difficult to collect the data they need.
- 82% said that when they do collect the right data, they don't have the time to analyse it properly.
- Only 24% of the charities we surveyed were collecting, analysing and implementing data as part of their strategic planning and decision-making.

We routinely collect, analyse, and incorporate our data to be part of our strategic planning and decision making.

Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree
5%	19%	26%	34%	16%

When we collect the right data, we don't have the skills to analyse it properly.

Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree
13%	35%	24%	27%	1%

In this guide, we break the answer to this question down to four steps: data collection, data analysis, data implementation and what we're calling data internalisation.

Step 1: Collecting

The first step in your journey to using data to achieve greater fundraising success is to collect high-quality data that will provide insight into your existing supporter base and your impact. Collecting the right data and in the right quantity is paramount.

Good quality data

The intelligence we get from donor profiling is invaluable because it allows us to identify prospects with a higher likelihood of giving. But you must collect good quality data. Good data needs to be:

- **Accurate:** Is the data you collect recent and correct?
- **Consistent:** Wherever possible, collect the same core information about each of your supporters.
- **Intentional:** You should always have a reason for collecting the data you do.

A note on using impact data in fundraising

While this guide focuses on how you can use donor data – information you record about your supporters and the actions they take – to drive your fundraising strategy, it's worth noting that the information you systematically record about your charitable impact can have huge fundraising benefits too. Research shows that 63% of donors want to know how the money they donate will be used by your organisation,[9] and impact data is the evidence you have that your work, which donors have helped you fund, is creating measurable change.

Both quantitative data (data expressing a certain quantity, amount or range – this would include numbers and statistics) and qualitative data (data that is not measurable in numbers but includes stories about the impact you've made) can be useful tools for showing loyal donors how your work is making a difference and for encouraging new contacts to support your work.

If this impact data is managed outside of your fundraising team, work with the team that collects and analyses this information to show what change your services or programmes are making in the world. Incorporating these stories into your fundraising messages and campaigns will help you create stronger appeals that encourage your supporters to give.

The key to collecting data that is accurate, consistent and intentional is to first decide exactly what you want and need to know.

One way to start making decisions about what information to capture is to think about what information is costly, and which is not. That which is costless – like IP addresses of people visiting your website for example – can be tracked regardless. But some information comes with a cost. Asking someone to share information about themselves is costly with regard to their time, for example, and data that is for sale is costly financially.

When it comes to costly data, it is important to ask yourself what you are trying to use that data to answer and decide what to collect based on that. What information do you need in order to improve your communication with existing supporters and your ability to identify new ones like them?

Make sure you have a purpose for collecting the information you do – this is critical in keeping your data clear, concise and easier to analyse down the line. Collecting too much data, without a clear intention, will only make it harder to analyse.

What data to collect?

For the purposes of improving your fundraising initiatives, the kind of data that will be most immediately useful is data that tells you who your supporters are (or are likely to be) and what they respond to.

The first is demographic data that tells you **who your supporters are**: gender, age and location. Once you have analysed this you can get a picture of who your supporters are as people, and how to best communicate with them. It also allows you to segment your campaigns based on specific groups of people to test what messaging is likely to resonate with them (more on this later).

Another useful type of data to collect is **how you can reach your supporters**, and how they prefer to be contacted. Ask them whether they would rather receive emails, text messages, phone calls or information in the post, and then collect that information. This will help you communicate in a donor-centric style and ultimately receive higher response rates to your outreach efforts.

Finally, **collect data on the actions your donors and supporters take**. The three key elements to look for in this data are: Recency (how long ago did a person donate or fundraise for you?), Frequency (Have they given or taken action more than once?) and Value (How much did they donate or raise for your organisation?).

Analytics tools are also making it easier and easier to see what kinds of actions your supporters take not only

with you but elsewhere in their digital lives. Facebook Insights, for example, can show you what time of day your followers are online; Twitter analytics let you know what general interests your followers express and which other Twitter feeds they follow.

Finally, use campaigns and testing to collect data about what channels, messages and designs lead more people to take the actions you want them to take (such as donating or signing up for an event). We'll talk more about how you can test this data in the data implementation section later on.

While collecting data about your supporters and how they relate to you specifically should be the focus for your organisation, **marketplace data** can help you flesh out what you know about your supporters with information like what social media channels they're using or what other interests they may have. There are some fantastic, free online tools available to gather this information, such as YouGov Profiles (https://yougov. co.uk/profiler). Marketplace data won't necessarily tell you who your supporters are exactly, but it is a useful tool to get ideas of what potential supporters might be interested in and on what channels it might be worth trying to reach them.

Make it easy on supporters

Collecting data about who your supporters are inherently relies on the information that they provide to you. Streamline this process so that the data you collect is accurate, complete and consistent. When creating sign up forms for a newsletter or an event, think about what you absolutely need to know: what is necessary for you to begin building a relationship with someone? Online forms in particular will receive a higher completion rate if they are shorter and to the point; one study improved online form conversion rates by 120% when simply reducing the number of fields from 11 to four.[7] Remember that you don't need to ask people everything about themselves on the first contact – as you build your relationship there will be time to ask more in the future. Ensure that you don't ask people for the same information more than once. For your supporters, having to provide their contact details to you twice is burdensome for them and could possibly disrupt their sense of their relationship with you.

A good rule of thumb is to only ask people for information you can't automatically get another way. This is why the option to login to a website with your Google or Facebook details is becoming increasingly popular – you can get additional information about someone without having to ask.

It is also extremely important to ensure that any data you collect and store adheres to data protection laws – to find out more about this, see our 'Data Protection Checklist'.

Step 2: Analysing

Effectively analysing the data you collect is one of the more challenging aspects of creating a data-led fundraising strategy. Your database will undoubtedly appear as a mass of numbers, percentages and values. But the key to useful data analysis is to look for the stories behind those numbers, taking context and external influencers into consideration and ultimately determining who your supporters are as people. As Beth Kanter and Katie Paine say in their book, *Measuring the Networked Nonprofit*, "analyzing data is not just data dumping. It's discovery!"[8]

It's worth noting that regardless of whether or not you have a dedicated data analyst on your team, it's important to decide on the right data management system and ensure that staff are knowledgeable on how to use it. Whether this system is a well-organised spreadsheet or a customisable CRM system, make sure that the people who need to use it in order to analyse data are able to do so accurately and effectively.

As Andrew states, "this is an area where expertise matters. Bad data analysis isn't just benign – it can actually cause damage to the work you are trying to accomplish."

For organisations with smaller budgets, you could safeguard your data by providing thorough training to a member of your fundraising team – for those organisations that are able, hiring a data analyst will allow you to continuously manage and analyse data effectively to make data an integral part of your fundraising team.

Asking questions of your data

To begin, consider your purpose for analysing data. Generally, this is to ensure more targeted communication that resonates with supporters. Data analysis helps you to:

- Determine who your most valuable donors are in terms of value and retention.
- Figure out which channels are best for reaching your supporters, and for various kinds of appeals.
- Tailor content to different audiences based on their responses.
- Help set realistic goals for the future.

The best place to start is to ask questions of your data: who are these donors who can help you reach your fundraising and charitable goals? And what do they want to see from you in return?

But for each analysis, you don't need to answer all the questions you have at once. Pick one or two questions that you can answer and act upon, and assess your data

by seeking the answers to only those. Some questions that are worth analysing your donor data for are:

- What are our supporter types?
- Which kinds of supporters give or raise the most money for us?
- How do big donors differ from smaller donors?
- What kinds of supporters have introduced other new supporters to our charity?
- What channels do our supporters respond on and which create the most conversions?
- What campaign messages do our supporters respond most to? Does this vary by supporter type?

These questions should correlate to the data you set out to collect in the first place when you determined what you needed to know in order to determine whether your efforts were successful.

Putting the answers into context

Once you've analysed your data to answer your questions, you can take your analysis further by comparing groups. Use your analysis of demographics and compare it with the actions people take. Do you find that men are more likely to respond to asks for text donations than women? Or that people under 35 are more likely to sign up for an event online than people in an older age group? With this analysis you can then ask if your current fundraising efforts are meeting the needs and interests of the supporters you are trying to reach.

It's also important to put these findings into context to understand the wider picture of what your numbers mean. You might know that in a given campaign, 65% of your donors were female, and appeals via email created the highest donation conversion rate. But expanding on those numbers, your analysis should consider context and the less measurable elements such as political implications, economic influences or any other factors that could create a greater or lesser need for your services at a particular time. Put more simply – what is the bigger picture here?

Taking the time to analyse your data is invaluable – it is truly the key to understanding who your supporters are and what they need from you. Once you have this understanding, you can leverage your analysis to create a picture of who your other prospects might be and how to reach them.

Step 3: Implementing

Applying what your data has told you to your campaigns and outreach is where you can really begin to build your data-led fundraising strategy. But it's worth bearing in mind that this is a long-term process – one which you can test, measure and evaluate over time.

View your data-informed output as an opportunity to engage in more donor-centric fundraising: basing campaigns less on what you want to tell your audience and more on what they want to hear. Use what your data tells you about your supporters to make your communications more interesting and relevant to them.

Figure out what works, and what doesn't

Ultimately, using what your data tells you will help you make stronger decisions when planning fundraising campaigns. It will also save you money as you find the most effective tools, channels and messaging for achieving your desired results. But how do you find out what is working?

The answer is to make educated hypotheses based on what you've gleaned from your data analysis (for example, 'we predict, based on past data, that men in their 30's will respond favourably to this appeal') and test them.

Segmenting and testing

Segment and code your campaigns based on the data you are using to inform them. Make a decision early on in your campaign planning about how you will segment your data, and how you will code the campaign element you are testing.

Coding allows you to easily analyse specific campaign activity and results later on. For example, when you advertise on Facebook, you are able to give your campaign a name. Using a code such as 'FA0515' for 'Facebook Ad May 2015' will help you directly attribute donations, sign ups or other actions taken from that particular advertisement. You can also code for different audience segments or creative (i.e. images, messages or calls to action).

Test one element of a campaign at a time; so if you want to know whether men or women are more responsive to a particular appeal, send the same message via the same channel to both - but track donations from men and women separately. This will let you focus your learning and glean more insight into what resonates with your various supporter types and will allow you optimise campaigns or fundraising asks in the future.

If you want to know whether email, text message or direct mail works best for a particular appeal, send each to random subsets of your data (each of which should have a similar make-up) and measure which brings in the most donations, sign ups or other desired results. Using randomisation to divide your audience is the most accurate way to ensure that each subset is more or less equivalent and is representative of your audience as a whole. You can optimise your campaign channels or messages overall by testing on a small, randomly

Top 10 reasons to use data in the fundraising process:

01 It gives you insight into your donor base.

02 It helps you determine who new, potential supporters might be.

03 It enables you to discover what channels, tools and messaging help you achieve your particular goals.

04 It saves time and money by informing which fundraising efforts are worth investing in.

05 It helps you build ongoing relationships with your supporters.

06 It provides evidence on which you can improve your fundraising strategy.

07 It engenders excitement and passion within your team.

08 It helps you raise more money.

09 It helps you set realistic goals for the future.

10 It helps you create change in the world.

selected percentage of your audience first, and then using the best solution in your communication with the rest of your audience.

For example, imagine you are testing which channel is most effective in encouraging people to sign up for your appeal. You could begin by using a randomly selected 20% of your supporters for testing which channel brings in the most sign-ups, and then use the preferred channel to contact the remaining 80% of your audience.

The more targeted you can be with your communication, the more personal and engaging your message will be. But try not to get bogged down in the numbers and don't assume that what has worked once will always work the next time. Look for patterns or clues about your supporters' general likes and dislikes, how involved they want to be with your organisation and ultimately, what moves them to give. if you don't find any patterns with a certain test, measure something different next.

Continuously testing, maintaining a human understanding and implementing what you learn as part of your fundraising campaigns will improve your intuition about your supporter base and will help you create a fluid and effective fundraising strategy.

Measuring results

Measure the results of your campaigns or outreach at the conclusion of the activity and evaluate for successes or failures. Did people respond the way you expected them to? Did implementing your data in a certain way increase the actions they took? Are there any opportunities you may have missed that should be addressed in future campaigns or fundraising work?

When assessing the success of data-led activity, focus on outcomes and not just on efforts. So for example, rather than focusing on how many emails you sent out, measure how many donations or signups came in as a result of the mailings. This extends outside of revenue too – look for engagement indicators to learn about the relevance of your campaign messages. Rather than simply measuring how many people saw your Facebook posts, record which posts received the most likes, comments and shares. Content that encourages engagement on social media is a strong indicator of what is likely to resonate with your supporters on other channels too.

In addition to looking at revenue and information coming in, data can also help you assess what's going out. Doing a cost-analysis based on how much a particular activity costs verses how many actions it brought in is extremely valuable to informing fundraising projects going forward. If you find that direct mail brings in large donations, but 90% of those donations are coming from people aged 55 and older, you could save money by only spending on direct mails to that subset of your supporters. This analysis will help you maximise your fundraising budget in order to bring in more money and accomplish even more of the wonderful work you do that will encourage your supporters to stay on-board and give again.

Step 4: Internalising

When you regularly collect data with a clear purpose, analyse your data and apply this insight to your

fundraising activity, you can then look to internalise data in order to create a 'culture of learning' within your team. This means that you are consistently measuring the impact of your fundraising activity, experimenting with data and making informed decisions about how you fundraise in the future.

What does internalising data look like?
Having a data-led fundraising culture within your organisation means that you'll be powered by continuous feedback informing your fundraising team what does and doesn't work, and how your fundraising strategy can be continuously better. As leading data and fundraising expert Beth Kanter, who we interview later in the guide, describes it, "it's a culture of curiosity: people are interested in asking questions and answering them with data."

A data-led fundraising culture that is based on learning and growth is flexible and evidence-based. Rather than defaulting to what has been done in the past, or building campaigns around what you think will work, your strategy will be informed by what you learn through data.

Internalising data as part of the way your team works means that you are always experimenting - testing, measuring and evaluating your efforts along the way. It means constantly creating small opportunities to test out parts of your fundraising strategy, and then prove it along the way. Ultimately, your team should be driven by the need to find out what works, what doesn't, and how they can continuously improve their relationships with supporters.

Creating a culture of learning
It is important to bear in mind that internalising data into the way you work is a process that happens over time, so it helps to start small.

Rather than attempting to overhaul the way your fundraising team works, start simply by vowing to test a few key metrics in an appeal or campaign. As you would whenever you collect data, decide what evidence you need in order to show that you were successful – or unsuccessful – and what you can do better next time.

Collect and analyse data on these metrics, and then discuss with your team what they mean for you. How can improve your next appeal or campaign based on what you learned this time? What else do you want to know?

If you've tested and measured data well and you don't see exactly what you wanted to, don't let it get you down. View successes and failures as equally valuable – either way you have learned something about what works and what doesn't for your organisation. Gaining insight into your supporters' wants and needs takes time, and

every learning along the way should inform the way you conduct your next campaign or outreach.

By continuously running these kinds of tests, however small, you will gain much broader insight over time into what your supporters really want, need and respond to. Ultimately, internalising data into the way you work means making learning a priority. By regularly testing and measuring and by strengthening your team's skills in data analysis and management, you will be well on your way to building a data-led fundraising strategy that works.

What's inside?

Four steps to using data: In each of these four sections, we look in depth at Data Collection, Analysis, Implementation and Internalisation. Each section includes an overview, an interview with an expert in the field to talk about theories and techniques behind each step, and a featured case study to highlight organisations who are successfully putting data and fundraising into practice.

Data Protection Checklist: The Institute of Fundraising has provided a useful Data Protection Checklist along with an overview of how you can make sure you stick to data protection rules when using data as part of your fundraising strategy.

Other Resources: Other resources for how best to use social media for fundraising.

References
1   www.blackbaud.co.uk/ukonlinegivingtrends
2   npengage.com/nonprofit-fundraising/the-2014-charitable-giving-report/
3   www.NPResearch.org/images/2015-reports/NRC_W2015_F.pdf
4   sumac.com/donors-say-they-have-more-to-give/
5   www.nten.org/sites/default/files/data_report.pdf
6   www.thinknpc.org/publications/money-for-good-uk/
7   www.imagescape.com/clients-like-you/contact-form/
8   Beth Kanter & Katie Paine, Measuring the Networked Nonprofit: Using Data to Change the World, October 2012
9   www.hopeconsulting.us/wordpress/wp-content/uploads/2013/04/MoneyForGood_II_Full1.pdf
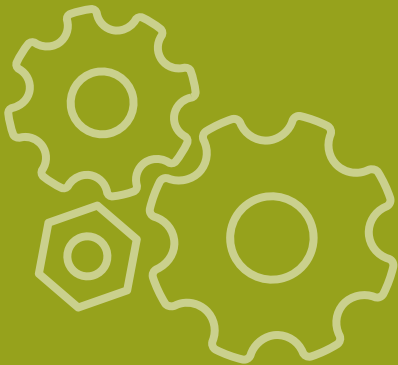
STEP 1: COLLECTING

01

02

03

04

STEP 1: COLLECTING

The first step to using data effectively as part of your fundraising strategy is to collect high-quality data about your supporters – who they are, how they think and what they respond to. When collecting this information, think first about what you are collecting it for. How will it help you better understand your supporters and improve your campaigns? Decide what exactly you want and need to know. Having a base of clear, consistent data is crucial to being able to accurately analyse and implement data strategically later on.

Some important points to remember about collecting data when you're getting started are:

• Good data is accurate, consistent and intentional: You should always have a reason for collecting the data you do.

• Weigh up the cost (in time or money) of collecting certain data. Ask yourself what you are trying to use that data to answer and decide what to collect based on that.

• Collect demographic data, attitudinal data and behavioural data to produce a clearer picture of who your supporters are, what they want and need, and what actions they take.

• Collect data with each fundraising campaign in order to find out what channels, messaging or audience work well and what doesn't.

• Make data collection easy on your supporters: don't ask them everything at once, and clear any obstacles that could prevent them from providing information to you, such as keeping online forms short and to the point.

This section provides more information and advice on how you can begin collecting data successfully and strategically in order to gain deeper insights into your supporters and your impact.

We've spoken with Andrew Means, one of the world's leading experts on using data for social good, about how charities can refine their data collection strategy. Andrew draws on his experience with data to provide helpful tips and strategies you can use to collect good quality data that will help you continuously improve your fundraising efforts.

We also feature a case study, SolarAid, to outline how one organisation is effectively collecting data to achieve greater fundraising success. They outline their data collection strategy and why it works for them, and provide advice to other organisations that want to improve the way that they collect donor data.

INTERVIEW:
ANDREW MEANS, THE IMPACT LAB

Andrew Means is Founder of Data Analysts for Social Good and The Impact Lab. He is one of the world's leading experts on how data can be used to create a more efficient charitable sector and make a meaningful difference in society.

Why should charities be using data to inform their fundraising strategies?

Data is very good at helping you improve outcomes, and helping you optimise towards a specific goal. Data can help you fundraise more efficiently and practically so that you aren't just relying on a gut instinct – it helps you achieve very concrete and measurable goals.

What information about donors or supporters is critical for charities to collect?

Demographic data, such as supporters' names, ages, locations, etc, is important as a basic first step. But moving beyond demographic information, there are two types of data that are really key: attitudinal data (how a person thinks or feels about themselves, the world or your cause) and behavioural data (what people actually do, how much money they give you, how often they visit your website, how often they open your emails, how often they come along to your events, etc). Often there's a difference between how we want to behave and how we actually behave, so knowing when that occurs is important.

> "Data can help you fundraise more efficiently and practically so that you aren't just relying on a gut instinct – it helps you achieve very concrete and measurable goals."

What tools do you recommend people or charities use to collect attitudinal data and behavioral data?

Attitudinal data is generally collected through things like surveys and opinion polls – any way in which we ask people how they think and see the world. Fluid Surveys (recently acquired by Survey Monkey) is a really useful surveying tool, especially if you have an identifier for everybody, or information you want to collect which appends to the survey automatically. Part of that is collecting this information at various points in time – so when someone signs up for your email, send them a short welcome email that includes the link to a short survey with three to five questions like "how do you hope to get involved with us?" Then a few months later, send them a few more questions. Slowly you'll build a picture of how people feel about themselves, and how they want to engage with you.
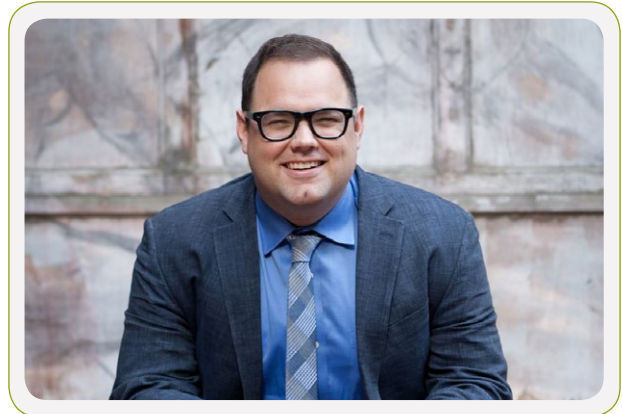
Behavioural data is largely collected through automated systems – through your email programmes, for example, which tell you how often people click and what links they click on. Or through your fundraising system, which is collecting data on how much money someone gives and how often they give. Try and use email clients that will let you track and collect at the individual level, or use a fundraising system that is structured well, allowing you to follow individuals. The really important thing to focus on is understanding the individual. One of the most powerful things you can do is to move from demographic marketing to individual marketing in fundraising. Getting that individual information is important.

How can charities ensure the information they're collecting about individuals is accurate and consistent?

Automate the data process as much as possible using technology and consistent processes. So for example, when someone joins your email list, the next day they get a welcome note, maybe a month later they get a short email with four questions. Systematise the way that you gather this information – it should automatically

get pulled out of whatever email client or fundraising database that you're using over time.

When you store data, have one place of truth – one data repository where everything goes into about the individual, to find out about the truth of this person. That will help you avoid someone being questioned twice, and it will help you ensure that there aren't gaping holes in your data too. This repository could be a fundraising tool like Raiser's Edge, or it could be a well-managed Excel spreadsheet if resources are tight.

> **"Try some experiments: try them on the main population, and use that work to show the senior managers how it works on a smaller scale. Explain how it could work on a larger scale."**

How can charities make good decisions about what information they need to collect at a given time?

I suggest asking yourself: what's all the information we wish we had? Would it be realistic to collect the information we want – what would we do with it? Focus on actionable information that gives you options on what to do with it. Identifying someone's attitude towards your organisation is actionable, for example. Some organisations over-collect data that is never used, and is never actionable. Because this is costly, in terms of time and energy from these potential donors, you don't get any benefit from data that is not being used strategically.

What are the dangers of collecting or keeping poor quality or messy data?

Bad data is data that is inaccurate or inconsistent, so for example it could be that you don't have correct information about supporters or that there are big gaps in the data you have collected. The real danger is that somewhere along the line you forget that it's bad data, and start creating actionable decisions off of it – and those decisions are wrong, because you're being informed about the wrong thing.

If the issue is that your data is messy because for example some people are spelling a word this way, some people are spelling it another way and you just need to fix something, then tools like Google Refine are useful for cleaning it up. Bad data on the other hand – data that is untrue – can't be fixed so should be avoided.

How can fundraisers convince senior managers or other decision makers within the organisation to buy into the importance of investing in data?

Start small, and document your wins. I think it's as simple as saying "You know, if I ran a couple of tests, I could improve the click through rate of our email campaigns by 5% or 10%" or whatever it may be. Try some experiments: try them on the main population, and use that work to show the senior managers how it works on a smaller scale. Explain how it could work on a larger scale. So start with small wins and accumulate them over time.

What three pieces of advice would you give to nonprofits that are just beginning the process of collecting data in a more systematic way?

- **Collect more attitudinal and behavioural data:** I think that that we don't ask donors enough in a systematic way how they feel about us, and how they want to get involved with us. When it comes to behaviours, look beyond what people give or what emails they open. Look at social media, or other kinds of behavior to get the bigger picture. Enabling people to sign into your website using Google or Facebook, for example, can help you get additional information about them without having to ask.
- **Automate as much as possible:** Systematise the way that you plan on gathering information. Don't ask people the same questions twice – and be consistent with what you ask everybody and when. Create a calendar or process for when and how you collect information about supporters. This saves you time and makes it easier on the people whose information you are collecting.
- **Run more experiments:** Test hypotheses about how people want to engage with you, and then be smart about how you gather those results. You should test every campaign before it goes out and think about how that test will directly address your hypothesis. Start shifting your behaviour based on what your data tells you – if you find more people are giving to you in the morning, then promote your appeal in the morning. Compare how much money you raised to what you think (or know) you might have raised from an old method.

Connect with Andrew

- meanswelldoesgood.com
- theimpactlab.co
- @meansandrew
- /meansandrew

CASE STUDY: SOLARAID

SolarAid is an international charity that sells solar lights in Africa in order to tackle climate change and poverty. They have now sold over 1.7 million solar lights, which have helped families save money, increase study time and improve their health.

Kat Harrison, Director of Research & Impact, and Richard Turner, Chief Fundraiser at SolarAid, say that data collection is "absolutely key" to their fundraising strategy, but perhaps not in the traditional way.

"We collect good quality donor data, but we also focus much of our limited resource on data that matters to our supporters to show them the impact of their support ("impact data")," Richard says. Kat elaborates, "Collecting both kinds of data enables our fundraising team to engage with supporters and recruit new ones using impact propositions."

Gathering good-quality data

The SolarAid fundraising team works closely with the research and impact team to collect both donor data and impact data. The decision to invest in collecting data came about three years ago as a result of their goal to eradicate the kerosene lamp from Africa by 2020. To be more effective and efficient, they needed to collect evidence of the impact they were having on the ground.

"We knew what we wanted to learn and designed our data collection strategy specifically to get us this information," Kat says. In order to collect consistent, accurate and intentional data, Kat's team ensure that the questions they ask reflect exactly what they want and need to know.

Kat puts great emphasis on training a research team that works on the ground in Africa. "I keep our database consistent by ensuring the team always uses structured questions – they don't ask questions that could be misinterpreted. We do data consistency checks before we even touch it for analysis."

SolarAid also set themselves up to ensure accurate and consistent data by investing in Salesforce, where all their contacts are stored. As Kat explains, "Often, our research contacts are also supporters," so storing all individual data in one place ensures that they are always building one clear picture of their base. SolarAid also stick to free, easy to use tools that their teams are familiar with, such as Excel, R, Survey Monkey and Picktochart.

Using data to engage supporters

By putting data collection protocol in place, SolarAid soon had scores of information about the impact of their work on families in Africa. The idea to systematically apply impact data to their fundraising strategy quickly followed.

SolarAid's fundraising strategy now revolves around presenting supporters with data about the impact of their donations, rather than on what charity activities the money enabled. "Instead of saying, for £10 we can train X many people, we've been able to say things like: £30 helps us avert 5 tonnes of CO2. As a result our supporter base is growing and our supporters have become more loyal and they feel part of the journey," says Kat.

Making it easy on supporters

With more supporters than ever before, SolarAid are turning their attention to strategically collecting donor data too. "We collect donation history so we can recognise long term supporters - and use this information to tell them the sum total of their impact," Richard says. "We also log engagement - what communications they have received and how they've engaged in return."

Richard's team also collects more in-depth data about supporters' attitudes and behaviours, but makes it easy on supporters by not collecting all information at once. When someone signs up for the e-newsletter, they first collect just their email address. They then get in touch personally to ask people more about themselves, such as their names and why they chose to donate to SolarAid.

They have also started using online surveys – Kat's team helps devise the questions. "Our supporters give answers which help us understand their motives," Richard says.

Creative data collection

SolarAid also makes data collection easy on their supporters by making it personal and fun – to do this, they think outside the box. "Thinking about how to be creative with data and how you'll use it is the best way to see results from it," Kat explains.

In one recent appeal, SolarAid asked supporters to write a commitment to helping SolarAid make an impact. To find out what impact their donation would have, they could use SolarAid's 'Impact Calculator' – an online tool which takes any monetary amount and calculates the estimated impact that donation will have on a beneficiary's family wealth, education, health and wellbeing (this tool is consistently updated with new data that Kat's research team collect).

Another recent appeal brought supporters directly into SolarAid's data collection process. "We invited supporters to ask solar light users anything they wanted to. We then got our research team on the ground to gather information to answer these questions directly," says Kat. By enabling supporters to ask questions of the charity's customers, SolarAid are cleverly collecting data on both the impact they are having in Africa, and the interests and needs of their supporters at the same time.

"The data we collect from talking in-depth to stakeholders and supporters enables us to build rich stories and case studies of how our work affects real people's lives," says Kat.

"We can then talk credibly about the impact a donor has at an individual level," adds Richard. "It really resonates with supporters to know what they're helping us achieve."

Advice for other charities

Richard and Kat have three key tips for other charities that are beginning to look at their data collection efforts strategically. They say:

- **Invest in a supporter database:** Such as Salesforce so you get the basics right and can build on it - it's a constant process of improving your data and learning from it.
- **Decide where to invest your limited resources:** To begin with, rather than collect huge amounts of data about your supporters, focus on collecting data about what matters to your supporters.
- **Talk about the impact of donations and your work:** While it might be interesting to know that 1.7 million

solar lights have been sold, the fact that those solar lights have saved families an estimated $345 million means more.

By collecting the right data in the right way, SolarAid have used impact data to build their own credibility and transparency, which leads to trust and loyalty with supporters.

This loyalty is reflected in SolarAid's supporter growth across many platforms. Showing supporters what impact they can make has enabled them to increase the number of people who follow them on social media channels by over 140,000. They also raised 44% more money from individual givers last year than they did three years ago.

"We now can focus and target our communications, both in terms of subject matter and the medium we use, to engage even more effectively with our supporters," Kat says. Maintaining their focus on impact, supporter interests and intentional data collection will undoubtedly enhance SolarAid's fundraising success for years to come.

Three takeaways:
1. **Collaborate to collect consistent data:** Work with other teams to ensure that everyone is collecting data and storing it consistently. This improves the accuracy of your database and helps with analysis and implementation later on.
2. **Make it easy on supporters:** Collect data about supporters over time and engage with them directly to find out where their interests lie.
3. **Think creatively:** Engage your supporters in the process of learning more about them. Show them that you make their interest your priority and what impact their ideas and gifts have on what you accomplish.

Connect with SolarAid

☐ solar-aid.org
🟩 /SolarAid
🟦 @solaraid
🟥 SolaraidOrgBrighterFuture
🟠 /solaraid

STEP 2: ANALYSING
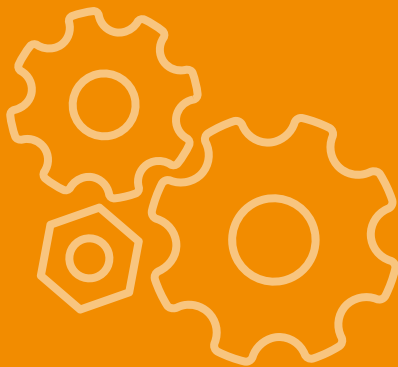
STEP 2: ANALYSING

Analysing data well enables you to identify who valuable donors are, what channels are best for reaching them on and what direction you should take in the future. Approach data analysis as a process of discovery, which allows you to understand who your supporters are, what they want and why they do. Analysing the data you've collected is when you really have the chance to gain insight into what is working, what is not and what you can improve on going forward.

Here are some key points to remember when analysing data:

• Look for the stories behind the numbers, taking context and external influencers into consideration and ultimately determining who your supporters are as people.

• Expertise matters – bad analysis can undermine what you're trying to accomplish. Whether you have knowledge of analysis in house or you collaborate with an external analysis partner, ensure that whoever is responsible for data analysis has the proper skills.

• Ask questions of your data: who are these donors who can help you reach your fundraising and charitable goals? And what do they want to see from you in return?

• These questions should correlate to the data you set out to collect in the first place when you determined what success would look like.

• Put your findings into context to understand what the numbers really mean. Ask yourself, what is the bigger picture here?

In this section, we dive deeper into how you can begin analysing data to build insights which will inform and improve your fundraising strategy over time.

We hear from Nik Shah's from Facebook's Measurement Team. Our featured case study is Parkinson's UK, who use data analysis particularly well in order to understand their donors and generate more income. They share how they analyse data in order to gain deeper insights into their supporter base, how this has led to greater fundraising success and tips for other charities who are just getting started.

INTERVIEW:
NIK SHAH, FACEBOOK

Nik Shah is a Measurement Partnerships Lead at Facebook, where he develops new methodologies for measuring ad effectiveness. He previously worked at dunnhumby and the Future Foundation, and studied philosophy, politics, economics, methodology and statistics.

How can organisations analyse data more effectively?

Getting the right data and asking the right questions of it are much more important than how precisely you analyse the data. You can have petabytes of data and throw a machine learning algorithm at it, but if it's not actually representative of what you're looking at, or if you are asking questions that don't line up with what you want to learn from it, then you'll end up misleading yourself and others. Good quality data accurately represents what it is you want to know or are interested in.

What kinds of data can charities get from Facebook about their supporters and their networks?

Facebook doesn't give out insights about individual people, but there are a number of insights you can gain about your audience as a whole. 'Custom Audiences', in particular, helps you do this.

> **"Knowing what you're looking for is really important. Analysing data without any particular reason why and what for is a sure recipe to get you into trouble."**

Custom Audiences allows you to take your email or phone database, or people who have visited your website, and upload an anonymised version of that list to Facebook in a privacy-safe way. You'll need to open a Facebook ads account but you don't need to buy any ads. It's an incredibly powerful targeting tool, because it means that you can target (with ads or posts) existing supporters or other people on Facebook who have many characteristics in common with them.

We've also recently launched a Custom Audience Insights tool, which enables you to look at your audience and see what these people actually look like. For example, most of these people have come from the US, they're mostly interested in pets, or America's Next Top Model, etc. It's a good way of getting to know the people who engage with your campaigns, what they care about and how you can reflect that in your communications.

How can charities start analysing the data that they collect?

The first step is to clarify the questions that you want to ask of your data: What are we actually trying to achieve? Do we want to find the most likely volunteer group to respond to a campaign or identify the interests of potential donors? Knowing what you're looking for is really important. Analysing data without any particular reason why and what for is a sure recipe to get you into trouble.

Storytelling is key here. It should be implicit in your analysis from the start – you have concrete questions that you want answered, and the story is the answer to those questions. Try to avoid going off on tangents because you found something surprising in the data.

Do you think it's important that organisations employ a data scientist or train staff on how to analyse data effectively?

I think a minimal level of data literacy is important. It's very easy to present statistics in ways that are misleading, such as not starting graph axes at zero and therefore exaggerating the importance of very small

fluctuations. You don't have to be deep into a particular statistical tool, but I think a critical approach, and an awareness of the various ways in which data can mislead people, are important.

I think the best analysts are not the ones who have necessarily the flashiest skills, or can build the most sophisticated models, but rather those who are aware of all the business needs. They create theories and interrogate the data to prove or disprove those theories. Quality of analysis doesn't come from sophisticated technology, it comes from asking the right questions and keeping the organisation's goals in mind.

> "Thinking more holistically about customer journeys is really important, and it goes back to asking the right questions."

How can data analysis help organisations with planning and improving future campaigns?

There's a real tendency for organisations to look at their click-stream data to try and find out where people came to their website from, and they only look at the last click that led someone to their site. But more often than not, that last click is from a site that didn't generate the interest to begin with. For example, if someone sees a TV ad for your charity and then searches for you on Google, it was the TV ad that brought them to you - Google just harvested their interest, if you will.

It's important to think about the whole customer journey – how do you awaken people's interest? What media are acting at the awareness stage of the model, at the middle, and then harvesting that interest? Thinking more holistically about customer journeys is really important, and it goes back to asking the right questions.

How do you see organisations making data a regular part of their campaign strategy?

Primarily through experimentation – which we often encourage brands to do on Facebook. It can be as simple as finding two similar cities, and trying out one tactic in one city and another in the other. So say a campaign that includes a picture of goat in Blackpool, and a campaign that doesn't include a goat in Blackburn. See what works. Even better would be splitting your custom audience randomly into two and testing different strategies on each half.

Be rigorous about only changing one thing at a time to see what is working well and what isn't, and that can

help you over the long-term. Each change might only make the difference of a couple percent, but over the long term all those different bits add up to help you build a bigger picture.

What are some of the most useful tools or resources that organisations can use to help them with their data analysis?

A lot of analysis can be done in Excel, but there are other great open source tools out there that are free and very powerful. R, for example, helps with statistics and data modeling, and it's completely free to use.

If you're doing A/B tests and you want to know if the differences you're seeing are significant or not there are significance calculators online as well which are free. You can plug in the results of your A/B test and it tells you whether it's worth paying attention to or not.

What three pieces of advice would you give to organisations who are just starting to use data as part of their fundraising strategy?

- **Decide what you want to know**: Analysing data is not really a goal in itself, so work out what the questions are you want to answer, and make sure that the data that you gather is appropriate to answer those questions. Be alert to sources of bias or skew – keep an eye out for anything that will make your analysis misleading.
- **Stay focused on the questions:** If you look hard enough, then you might find tiny variations that look significant, but actually the key thing should be "Is this related to the original question?" Occasionally you just have to accept that there's no positive result there, but that's okay too – that's why we do research.
- **Don't attempt to measure and act on hundreds of different variables:** Pick a few that you understand and that you can act on. That will help you make a genuine, positive impact and avoid mindlessly throwing algorithms at data without knowing what you're looking for.

Connect with Nik

- /nikhsha
- @nikshah
- in/nikshah

CASE STUDY: PARKINSON'S UK

Parkinson's UK works to find a cure and improve life for everyone affected by Parkinson's Disease. The charity is the world's largest patient-led Parkinson's charity and Europe's leading non-commercial funder of Parkinson's research.

Parkinson's UK's emphasis on analysing data began back in 2010, when their fundraising team realised their investments weren't yielding the results they wanted to see. They were mailing the same group of warm contacts with each appeal and seeing net income decline every time. After years of investing in cold acquisition without much success, the Parkinson's team decided to look inward at their existing supporter base.

With careful data analysis they identified 70,000 individuals who were in their database, but had never been mailed, or hadn't been mailed for years. As Paul Jackson-Clark, Director of Fundraising at Parkinson's UK, says, "there were untapped pools of dormant donors waiting to be re-engaged and become some of our top performing donors."
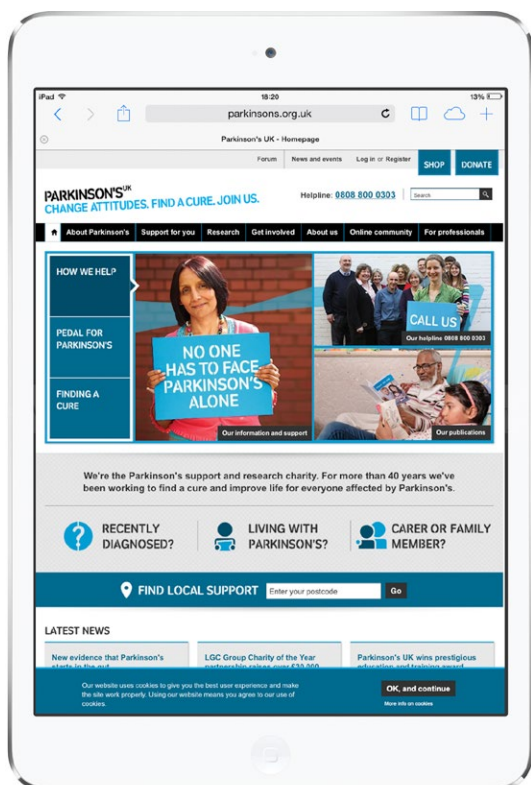
In just three years, they've added £750,000 to their bottom line by using this new analysis model. Today, analytics are the foundation of much of their fundraising efforts and they use their insights to build fruitful, lasting relationships with their donors.

Expertise matters

Before the Parkinson's team could embark on a new model of analysing data, they knew they needed guidance to do so. Whether it was investment in staff training, or in working with an outside partner, expertise was needed in order to begin gaining actionable insights from their data. Ultimately, Parkinson's UK teamed up with Wood for Trees, who specialise in helping charities gain strategic insight into their databases.

Paul explains, "Wood for Trees really understand fundraising and fundraising data. They understand how supporters make decisions. They also understand that we are a medium-sized charity and don't have money to burn. Currently, they are supporting us to bring analytics in-house."

A process of discovery

With Wood for Trees on board, it was time for the Parkinson's team to find out how they could improve the success of their appeals and raise their bottom line. As Paul remembers, "We suspected the traditional RFV modelling (recency, frequency and value) was limiting us to just one pool of supporters and we were neglecting other individuals in our database who might be responsive to appeals if only we asked. I said, 'I'm convinced there are nuggets of gold in there.' So we started digging."

The Parkinson's team spent four to five months looking at old, archived data. They analysed small subsets of data groups and looked at historical appeals.

After examining many options they established two models to discover who in their database might be responsive to the right campaigns: The first was characterising existing 'best givers' from past campaigns. The other was identifying a set of supporters who were predominantly excluded from mailings but who actually had a positive propensity to respond.

"In doing that, we could see that some groupings had an inclination to give to specific appeals in the past, but we

had sent them other kinds of mailings and it had turned them off," Paul says. "We decided it was worth going back to them again to see if we could reengage them by sending them the kinds of appeals they were interested in before."

The result was an enormous reengagement of 70,000 people, and a significant uplift in revenue. Paul states,"five years ago, our average response rate was 8%, and average gift value was £19. Now, our average response rate is 12% and our average gift has nearly doubled (£35)."

Stories behind the numbers

Today, Parkinson's UK's approach comes down to consistently asking questions of their data. "We ask, why?" says Paul. "Who are the people who support us? Who else looks similar to them and might respond positively to similar engagement? What can we do differently to change responses? How can we track outcomes?"

While asking these questions means first looking objectively at what the numbers say, the key is then to look beyond the numbers and put them into context. It's this next step in which Paul says Parkinson's UK always maintains a human approach in order to see the true stories behind the numbers.

"In fundraising, your data is all about people, activities and associated transactions, whether financial or time," Paul says. "Great analysis should create meaningful stories and pictures about your fundraising and should help you envisage what's possible in the future."

Painting the bigger picture

Parkinson's UK also taps into their supporters' online worlds to create a truer picture of who their supporters really are. To do this, Paul says they "propensity screen" every individual when they are added to the database fortnightly (their CRM system is Raiser's Edge), including data from third party platforms like JustGiving. "Personalised relationship management is the target and it's achievable, even across big data sets," he says.

By analysing their own data alongside information from other platforms, Parkinson's is able to gain deeper insight into who their supporters are, who they associate with and what they do. It has created the opportunity to identify new supporters, too.

"Including data from third party platforms has allowed us to look at not only our key supporters but to also gain insight into their social networks and identify names of individuals that we had an interest in getting to know," Paul says. Their ongoing data analysis provides them with the insight needed to cultivate these new supporters, build long-lasting relationships and raise more money.

Advice for other charities

For charities that are just embarking on data analysis for the first time, Paul's advice is practical and simple: keep your database clean so that your analysis can help you discover the truth. He says:

- **Assign clear responsibility:** Have absolute clarity about who is responsible for managing data.
- **Keep your data clean:** Create, agree on and manage simple, consistent data entry rules. If it becomes a free-for-all you lose control of the integrity of your data. And if your data is rubbish, your analysis will be rubbish too.
- **Don't reinvent wheel:** Speak to other users who've done it before and take all the best ideas and approaches on board. Make use of special interest groups like Institute of Fundraising and LinkedIn There's lots of free advice out there.

Data analysis has enabled Parkinson's UK to attain a deeper understanding of their supporters and to reengage with people they thought they'd lost. Going forward, Paul says, "we're much more systematic in our approach to which appeals we send to which people. If their inclination is to only give for research, we'll only send them that. We're not going to waste supporters' time or ours." As long as they continue prioritising data, their remarkable fundraising success will only continue to grow.

Three takeaways:
1. **Dig for gold:** Analysing data is a process of discovery – it is your opportunity to find out who your supporters really are, and how you can improve your campaigns. Always be asking "why?"
2. **Look beyond the numbers:** Seek the true stories behind the numbers. Who are the people who support you? What do they like, want and need? Look for indicators as to how can you engage them further in your cause.
3. **Paint the bigger picture:** Incorporate third party data into your analysis wherever possible. Use this analysis to find out more about supporters' online lives and their existing networks.

Connect with Parkinson's UK

- parkinsons.org.uk
- /parkinsonsuk
- @ParkinsonsUK
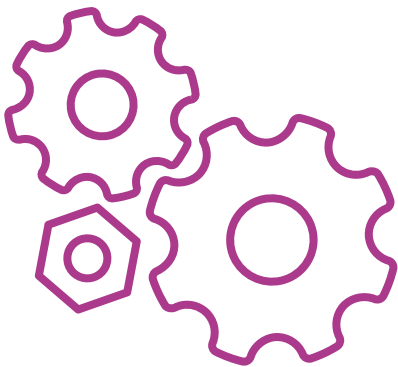- /parkinsons

STEP 3: IMPLEMENTING

01

02

03

04

STEP 3: IMPLEMENTING

Using the insights that your data analysis provides you, you can now implement that information as part of your ongoing fundraising strategy. By segmenting and testing data with each campaign or outreach effort, you can build important knowledge over time about how you can build mutually beneficial relationships with supporters. Data enables you to make evidence-based decisions about how to improve relationships and maximise income in the long run.

Some important points to remember about using data to make fundraising decisions are:

• View your data-informed output as an opportunity to engage in more donor-centric fundraising: basing campaigns less on what you want to tell your audience and more on what they want to hear.

• Make educated hypotheses based on what you've gleaned from your data analysis, and test them by segmenting, coding, and analysing. Ensure your coding is consistent so that your findings are accurate and trustworthy.

• Try not to get too bogged down in the numbers and don't assume that what has worked once will always work the next time. When assessing the success of data-led activity, focus on outcomes and not just on efforts.

• Maintaining a human understanding and implementing it as part of your fundraising campaigns will improve your intuition about your supporter base.

• Ultimately, using what your data tells you will help you make stronger decisions when planning fundraising campaigns. It will also save you money as you find the most effective tools, channels and messaging for bringing in your desired results.

This section provides more in-depth information on how you can begin to implement data effectively to inform and improve your fundraising strategy.

We feature an interview with Mike Bugembe, Chief Analytics Officer at JustGiving, who is an expert in using data insights to drive strategy and increase charitable giving. Mike provides tips on how charities can use data to make better fundraising decisions – and how JustGiving's platform can help them do so.

We also look at our case study, UK charity Friends of the Earth, who are successfully increasing their net income and refining their supporter journey by using data insights to make decisions. We'll find out how they've put data into practice in their fundraising team and what advice they have for others who would like to do the same.
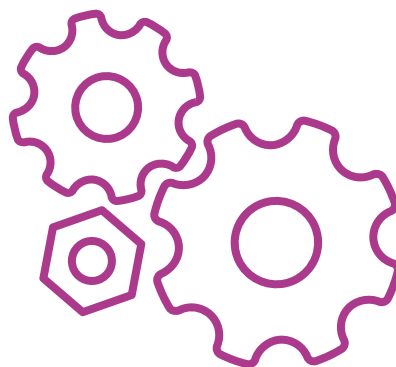
INTERVIEW: MIKE BUGEMBE, JUSTGIVING

Mike is the Chief Analytics Officer at JustGiving, the world's fastest growing social platform for giving. Since he joined JustGiving in 2010, he has successfully established data as the lifeblood of the organisation. His team of analysts, statisticians and data scientists are central to every operational and strategic decision the organisation makes by uncovering new growth opportunities and building smart data-centric products.

Why should nonprofits start using data to inform their fundraising strategy if they are not doing so already?

Data provides invaluable insight into your supporter base – and the better you can understand individual supporters, the more you can engage, stay relevant and maintain their interest and involvement with your cause.

In an increasingly noisy digital universe, charities need to create a seamless user journey across all channels to retain their audience's attention. Segmenting, testing and measuring data, and then improving the user journey based on what the data tells you, is key. For example, online fashion retailer ASOS.com, has one basic rule for building customer loyalty: keep the communication relevant. Based on a number of data points, they are able to tailor their emails to customers, such as sending them a discount code on their birthday or fashion inspiration based on what they have viewed on the site. By collecting data, ASOS is able to tailor the customer experience and build a more personal relationship.

> **"In an increasingly noisy digital universe, charities need to create a seamless user journey across all channels to retain their audience's attention."**

This is particularly relevant when engaging with digital natives – think people in their teens and twenties - who have only known a world dominated by digital technology. They have unforgivingly high expectations from the brands and causes vying for their attention online because they are bombarded with information on a daily basis. For example, if your Google Analytics is telling that

you more people are starting to visit your website on their phones and tablets, but you haven't optimised for mobile devices, that's a problem, particularly if you want people to be able to donate easily. In 2013, JustGiving re-launched our mobile donation process, so that people could donate with one touch or click and our conversion rate is now at 90%.

What kind of data do you think is most useful in helping nonprofits improve their fundraising campaigns?

There is enormous value in understanding the networks of the individuals that support your cause. Every day on JustGiving we see people go on to become lifelong supporters of charities that have been introduced to them by a friend directly affected by the cause.

Mapping and understanding your supporters' networks will help you better identify people who care, at the right time, in the right way and on the right channel. Often we see charities focusing solely on the people fundraising for them, but there is tremendous value in nurturing the people that sponsor a friend's fundraising.

How can implementing data – by segmenting, testing and measuring your fundraising efforts – help you raise more money?

Without data, charities are flying in the dark. Data enables you to understand how you are performing – are you growing year on year or are you declining? What's triggered that change? Who are your high-value supporters? How are you nurturing them to keep them engaged with your charity? What has motivated someone to support your cause?

Once you know the answers to questions like these, you can tailor your strategy to address them. For example, on JustGiving we saw that many people were motivated to start fundraising after the death of a loved one. As a result, we created an 'In Memory' product, which gave people a tailored and more sensitive fundraising experience. It also gives charities visibility of the people fundraising in memory of someone so they can add them into a more appropriate supporter care programme. Without looking at our data, we would have missed this opportunity to improve JustGiving for our users.

> **"There is enormous value in understanding the networks of the individuals that support your cause."**

How can nonprofits use data from JustGiving to figure out what fundraising streams or messaging are working and which are not?

From understanding whether your running events are outperforming your cycling events through to identifying your most loyal supporters, there is a wealth of data available to charities on JustGiving that can be extrapolated to identify key trends.

For example, for their London to Brighton event, British Heart Foundation (BHF) have identified that people who raise over the minimum fundraising requirement of £200, are more likely to do the event the year after and raise more money. With this intelligence, BHF are able to segment these people into a cohort and give them priority entry for the following year's event in advance of entry being open to the general public.

For smaller charities, where finding the time do this analysis can be a challenge, we have introduced a new Insights dashboard that highlights how they are performing year-on-year and gives them recommendations to help them grow online.

JustGiving also provides the names, email and postal addresses for all fundraisers raising funds for your charity and for those donors that have opted in to receive your charity's communications, providing a bank of high value supporters that can be added to your database and inspired to make more good things happen.

How can organisations integrate data from JustGiving into their CRM or other data management systems?

In terms of managing this data, let's start with the good old Excel spreadsheet - a valuable data management tool for many charities. All charities on JustGiving have access to our quick and easy reporting tools, which export their raw data into Excel, so they can slice and dice it however they need to. For charities using Salesforce, SnowGoose offers a simple tool for importing data.

There is also tech that automatically connects JustGiving with a charity's database. We have created a Data API that means approved partners can pull JustGiving data across to their systems. So far, our approved partners include ThankQ, Raiser's Edge, Donorflex and CiviCRM, and we've seen some charities use the Data API to pull data into their own bespoke systems. Using this API, charities have saved hours of time and eliminated the human errors that come with manually managing data.

What are some of the ways you've seen nonprofits improve the success of their fundraising campaigns based on what their data tells them?

After looking at their data, we've seen charities choose to invest in specific types of events, such as cycling or triathlons. For some this has been to combat what they found was a fatigue and saturation of running events. For others, it has been to capitalise on the trend that people participating in these events were raising more money per head.

We've also seen a rise in charities encouraging people to do 'DIY' fundraising after seeing an increasing number of people doing things off their own bat. For example, Cancer Research UK has an area on its website, 'Do your own fundraising', that inspires and supports people's individual ideas. Not everyone is a marathon runner, so it's a great way for charities to be more inclusive.

What three pieces of advice would you give to organisations that are not yet applying data to their fundraising strategy?

- **Decide what data you want to collect:** Have a clear plan for what you're going to do with it. What changes will it enable?
- **Invest in a good database manager and, ideally, a data analyst/scientist:** They are best placed to ensure you are collecting, and interpreting, data in the right way, so you can then make informed decisions.
- **Work with a partner like JustGiving:** We can intelligently connect your cause with people who care.

Connect with Mike

@MikeBugembe
/pub/mike-bugembe/1/512/150

CASE STUDY: FRIENDS OF THE EARTH

Friends of the Earth - England, Wales and Northern Ireland campaigns for solutions to protect the environment. Key activities in the past 40 years have focused on waking the world up to climate change, encouraging recycling and improving the way products are made for both people and the planet.

The Friends of the Earth (FoE) fundraising team are no strangers to using insights from their data analysis to implement changes to their fundraising programme. By tracking outcomes consistently and testing which channels generate action and response from supporters, they use data to inform future planning. As Paul Crotch-Harvey, Supporter Insight Manager at FoE, says, "we're using data to select outgoing communications, to administer the responses to that communication and to judge overall effectiveness, so that next time we can do better."
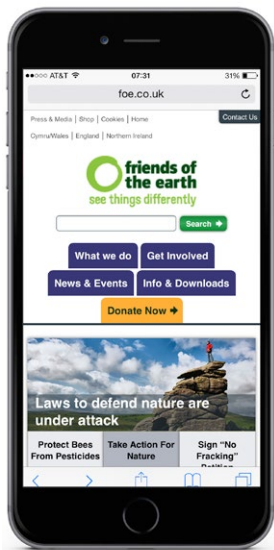
Recently, the FoE fundraising team have used data to make a major decision about the future of their fundraising. Based on their insights, they have decided to cut their Street Fundraising programme altogether, even though it historically had been a staple of their strategy.

This decision wasn't made lightly – Paul states that a great deal of testing, measuring and implementing data insights was done before the data suggested that this was the right path. It was also the result of building a trustworthy and systematic data structure from the bottom up.

A hierarchy of needs

Before FoE could implement data in order to make impactful decisions, they had to ensure that their process of collecting and analysing data was reliable enough to inform changes to their fundraising strategy.

This became particularly clear back in 2010, when FoE was facing an issue with the quality of their data. As Paul remembers, "historically, and usually due to resource constraints, we'd made decisions about how we handle data that were a bit 'fudgy'; instead of our data being 95% trustworthy, it was more like 60%. There was little point in doing in doing sophisticated analysis if we couldn't trust our fundamental data."

Paul, building on his degree in Psychology, saw an opportunity to end that frustration by using the concept of Maslow's Hierarchy of Needs. In Maslow's hierarchy, the bottom is made up of physiological needs -food, water, sleep- and at the top, which is difficult to reach, is self-actualisation. Paul noticed that you must always tackle the lowest issue in the hierarchy first – as he says, "there's no point working on things at the upper end of the pyramid if there are unresolved issues lower down."

FoE set out to overhaul their data systems, guided by a data-centric version of Maslow's hierarchy. At the bottommost fundamental level, was reliable tracking – ensuring that all their data testing included meaningful coding, using promocodes and link tracking to keep track of which streams or actions had what effect. Paul says that "at the top level, our holy grail is an integrated supporter journey that takes into account a supporter's desires and behaviour."

> "At the top level, our holy grail is an integrated supporter journey that takes into account a supporter's desires and behaviours."

They are working towards achieving this holy grail through regular data implementation to continuously improve their supporter journey, decipher which channels and audiences generate the most income, and make evidence-based decisions for the future.

Testing for supporter-centric relationships

Today, FoE's day-to-day fundraising revolves around data implementation: regularly monitoring and tweaking their outreach to ensure they're doing the best they can. They do this is through segmenting data to look

at one topic at a time: by recency, frequency and value, recruitment channel (i.e. face-to-face, mail, social media, etc.), or demographic segmentation.

In addition to day-to-day data implementation, FoE also make sure to take a step back and look at the strategy as a whole on a mid-year and year-end basis. "At these times, more radical changes to the strategy are possible," Paul explains. "Data has a role in making sure that the strategy is always supported by the evidence and our experience."

Making evidence-based decisions

One such radical change has been the decision to cut one fundraising stream entirely. "Street has been our main recruitment channel since 2009," says Paul. "At that time it brought the promise of a large number of recruits and cashflow. But after five years of tweaks, including bringing our Street program in-house, we felt that we'd done as much as we could to improve the ROI of our street work."

"The fixed costs of street fundraising meant that reducing volume in order to explore other channels would inevitably decrease the efficiency of the programme, so we've needed to make a clean break," Paul elaborates. And though Paul admits that it is intimidating to drop a primary fundraising stream, it was good to move away from a situation where one channel dominates all others.

The decision to cut street fundraising has already highlighted the impact making data-led decisions based on evidence can have. "Digging into the data has shown us that over the longer term, a program with smaller, more diverse, cost-effective campaigns can bring in more net income. We don't want to bring in lots of people just to have them leave before we can build relationships with them," Paul says.

Advice for other charities

When it comes to how other charities can implement data to inform future activity, Paul recommends remembering that success is built over time and in layers. He says:

- **Build from the ground up:** When it comes to making strategic decisions, you'll want a top down view of things. In my experience the only way to be sure that a top-down view is accurate, is to work from the bottom up. It's better to start small and be confident that you're accurate, then build from there, than it is to try to leap straight into the sophisticated, nuanced stuff. Remember Maslow's hierarchy of needs!
- **Put some time and effort into definitions:** For us the important definitions are things like: 'Supporter', 'Active', 'Committed Gift'. Make sure the definitions are used universally and, as far as possible make sense in relation to each other.

- **Build in layers:** If you're like us, you'll face the problem of not having the resources to do everything properly. One efficient way to ensure you're not constantly reinventing the wheel is to layer your data. Search Google for '3-tier architecture.' Essentially, you want to be able to take your transaction data, transform that using your business logic, and then present information in a form that is useful to everybody.

Cutting an entire fundraising stream may seem an extreme measure, but by implementing data as a key part of their fundraising strategy, FoE have uncovered insights they would never otherwise have known. Ultimately, the net savings from this evidence-based decision will enable FoE to try out new channels, improve supporter journeys and perhaps one day reach their holy grail – all through continuing to test, measure and implement data insights in order to get the best results.

Three takeaways:
1. **Code data consistently:** Make a decision early on about how you'll code different activities and channels so that your findings are trustworthy, to ensure that decisions you make are based on accurate data.
2. **Build by testing over time:** Segment data and test hypotheses on a regular basis, building the bigger picture over months and years. Every so often, step back and assess what this means for future fundraising efforts.
3. **Make data-led decisions based on evidence:** Don't be afraid to take extreme measures in the course of your fundraising strategy if those decisions are based on solid data. Evidence-based decisions can help you save or make more money in the long run.

Connect with Friends of the Earth

🖥 foe.co.uk
📘 /wwwfoecouk
🐦 @wwwfoecouk
Ⓖ /foe

STEP 4: INTERNALISING

01

02

03

04

STEP 4: INTERNALISING

Once you are collecting, analysing and implementing data on a regular basis, the next step is to internalise data as a driving force in your fundraising strategy by habitually measuring your efforts, testing, and analysing elements of your campaigns. By investing in this, you can ultimately create a culture in which your fundraising team is motivated by using data to continuously improve both relationships with supporters and the success of fundraising appeals.

Here are some key points to remember about creating a data-led fundraising culture:

• Internalising data into the way you work is a process that happens over time, so start small and build incrementally.

• Talk with your team openly about what your data tells you and what it means for your future fundraising decisions.

• Every learning along the way should influence the way you conduct your next campaign or outreach - your strategy will be informed by what you learn through data.

• A data-led fundraising culture is based on learning and growing, and is flexible and evidence-based – keep experimenting and trying new things.

• Ultimately, you should be thinking about how you can strengthen relationships with supporters. Use data to understand their wants, needs and how you can keep them connected with your cause.

This section will give you more information on how you can begin internalising data and creating a data-driven fundraising culture in your organisation.

We sat down with renowned data, fundraising and social media expert Beth Kanter to hear her theories on how charities can internalise data. In this interview, Beth outlines some key steps your organisation can take to start using data strategically on a regular basis and inspire data-driven work with your team.

We also feature our case study, UK charity Marie Curie, to find out how they have put internalising data into practice. They have told us about how they are working to create a data-led fundraising culture and what advice they have for other charities who are just beginning their own data and fundraising journey.

INTERVIEW:
BETH KANTER, BETH'S BLOG

Beth Kanter is one of the world's leading authorities on social media, data and fundraising for nonprofits. Her blog, Beth's Blog: How Nonprofits Can Use Social Media, is one of the longest running and most popular blogs for nonprofits. She is also the author of the books, 'The Networked Nonprofit' and 'Measuring the Networked Nonprofit.'

Why should nonprofits be using data to inform their fundraising strategies?

There are two key reasons. First - you'll often get better results: better engagement, retention, relationships, and ultimately more money, more volunteers, more potential board members and new donors. It will also help save time. When we're not measuring, or we're collecting data without any analysis or intention, we don't know exactly what works so we try to do everything – we have trouble making decisions on the right strategy.

What does internalising data into your fundraising culture look like?

There's a culture of curiosity: people are interested in asking questions and answering them with data. There's no blame game because it allows you to see the whole picture by stepping back and looking at the connections. It is constantly thinking about how we can get the right information to help us make decisions and do better.

But we have to be careful to not treat our donors like monkeys, as if we're Jane Goodall and we're observing the monkeys, by over-surveying them or over-focus grouping them. If donors are complaining that they're being surveyed too much you aren't honing in on the information that you really need in order to make good decisions.

How can organisations begin to internalise data within their fundraising teams?

You have to start out incrementally. Start with an easy place – track one thing, like an email appeal. Have a conversation about your objectives: talk about what evidence, or what data you would need to know that you were successful, or that you failed.

Narrow it down to two or three data points – and at the end of the appeal have another conversation in which you look at your objectives against those couple

of data points. Discuss what worked, what didn't, and how you can do better. Over time hopefully you'll have done that with all your campaigns, so you can pull all of that information and think about how you can improve.

> "But we have to be careful to not treat our donors like monkeys, as if we're Jane Goodall and we're observing the monkeys, by over-surveying them or over-focus grouping them."

What challenges do you see nonprofits facing when it comes to internalising data? What tips do you have for overcoming them?

The challenges come when charities haven't made data a priority, and they don't think they have time to do it, so they don't start. When you're learning or trying to do something new, getting started is the hardest thing.

You've got to get started with a small, easy step, and collect your first measurements. I recommend announcing it to the rest of your team and checking in all the time.

Once you get started you have to stick to it. It's all about forming good habits – always be A/B testing and doing experiments. Not wild experimentation, but against a

few metrics each time. Take the time to learn from your experiments before going full out.

Are there any nonprofits you know of that are a great example of having a data-led fundraising culture?

One example is the Humane Society in the US. They have instituted something called the "fifteen-minute meeting." When they've run a campaign, they get people from across different departments together: social media, fundraising, analytics – it's a big organisation. They get together for just fifteen minutes and debrief. The project manager collects the metrics on the campaign from different departments and they project these metrics on the wall in the conference room so that everyone can discuss it together. They capture their reactions and use them to inform their planning for the next campaign: they put it into practice. They do that all the time, and I think it's really cool.

> **"Once you get started you have to stick to it. It's all about forming good habits – always be A/B testing and doing experiments."**

What sorts of outcomes should organisations be looking for when measuring the impact of their fundraising efforts?

Everyone immediately jumps into dollars raised, or percentage of dollars raised, or the number of donors they have. Those metrics are important, but you have to remember that it's also about engagement and retention: how our supporters are interacting with us, whether new donors are coming to us, and the health of relationships.

If you are surveying your audience regularly, which you probably are, you can slip a question or two in there about relationships - how people feel about you, how they perceive you, and whether they trust you.

What tools can charities of any size or budget use to measure insight into the satisfaction and needs of their supporters?

There are generally three types of measurement tools. There are analysis tools, which are monitoring tools; there are surveys, which measure satisfaction, needs and perception; and there are analytics tools to measure engagement, views and conversion rate.

When it comes to measuring the needs of your supporters and their satisfaction, you have to get

that information from surveys. Survey Monkey offers free or inexpensive survey building tools. In my book 'Measuring the Networked Nonprofit,' there are some sample surveys on measuring relationship satisfaction as well as tips on how to survey well.

Excel is a basic but necessary tool for getting started too. You don't need to be an expert, but you need to know simple things like sorting your data and using formulas. Excel also has some really powerful visualisation tools built in that aren't that difficult to use which will help you present and understand your data - it's actually a lot of fun, too.

What three pieces of advice would you give to organisations who are not yet using data as a driving force in their fundraising?

- **Start with small steps, and have some accountability around it:** Make it a team effort.
- **Build up your skills:** Find a skilled volunteer, or find a class, become a student and don't think about measurement as a report card. Think of it as an opportunity to do everything that you're doing, better.
- **Get out there and test it:** Measurement and data are the things you can change, and testing is the way we're going to learn, improve upon the data and get better results. If you can build that measurement habit and change the way you work, you can change your organisation and you can change the world.

Connect with Beth

- bethkanter.org
- /Beth.Kanter.Blog
- @kanter
- /in/bethkanter
- /user/kanterbeth

CASE STUDY: MARIE CURIE

Marie Curie provides end of life care for patients facing terminal illness and their families. They offer advice, guidance, and support to help them get the most of the time they have left. Their fundraising team raises over £100m annually to make this care possible.

Marie Curie's fundraising team regularly collect, analyse and implement data as part of each campaign and appeal, with the goal to improve relationships with supporters and the success of their efforts every time. As Meredith Niles, Head of Fundraising Innovation at Marie Curie says, "Data is fundamental to our fundraising; it's a codified part of our strategy and part of the culture we want to project."

Over the past few years, Marie Curie's fundraising team have successfully used data to improve communications, raise more money and strengthen relationships with valued supporters. Their success is rooted in the fact that they place great importance on data as a driving force behind their fundraising strategy. But Meredith reminds us that internalising data is an ongoing process, and one that should always be evolving.

Getting started

Marie Curie's fundraising team didn't develop a culture of learning based on data overnight. There were teams, like direct marketing, where data had historically been a greater priority than in others, and so not every team was starting from a base of good quality data.

The direct marketing team had achieved great success by refining how they used data to make decisions and manage relationships with supporters, working with data insight partner, Wood for Trees, to develop a predictive model for helping to determine who to send warm appeals to. This model moves beyond the traditional measures of recency, frequency, value to incorporate additional variables that provide a more sophisticated picture of which supporters are most likely to respond to a particular appeal. After each campaign they check how the model performed, and use the new data to improve their accuracy for the next appeal.

By using data to consistently refine their strategy, Marie Curie's direct marketing team is always learning, improving and increasing net contribution. They're also nurturing relationships with supporters who are truly engaged in the cause in a way they couldn't do before. "This data-led model helps us exclude supporters who are less likely to be interested in particular appeals and to direct our efforts towards supporters who are."

The success of the direct marketing team in harnessing data for success inspired the rest of the fundraising team to raise its data game. She says, "we've tried to approach it from both directions: getting buy-in that we need to move towards a culture of evidence-based decision making, and working to create more robust data to inform our thinking." They are already seeing the benefits: "by adopting a more strategic approach, we are moving towards collecting less data and eliminating time spent on administrative tasks as a result."

Creating data champions

One of the ways in which Marie Curie is internalising data is by building up the ability of staff to champion data and influence team culture from the inside out.

"We are lucky to have a small business intelligence development team that is working with us to create visualisations of our data. The aim is to make it easier for fundraisers to use these insights to make decisions," says Meredith. "We help teams to become more data-led by making it easier for them to access actionable data."

Additionally, Marie Curie has a dedicated Fundraising Monitoring and Evaluation Officer to ensure the rest of the team considers data as part of all fundraising

efforts. She started out as a community fundraiser, so she understands how our business works on the front line. "She works with teams in planning mode to help them focus on the most important questions they'll want answered at the end of the campaign," Meredith explains. "She then helps them decide what information they'll need to answer those questions and make sure that they have a strategy in place for capturing and recording it."

Meredith says that strengthening relationships between teams and investing in data champions has been crucial to not only increasing buy-in from senior decision makers and other members of staff, but has also enabled fundraisers to ask questions with each campaign and answer them effectively.

Make data an open discussion
Making data part of the team's ongoing fundraising conversation has played a vital role in creating a mindset of learning and growth. "We now state explicitly that everything we do will be underpinned by excellent data and insight," says Meredith. They have also codified "practice data-driven decision making" as one of seven attitudes and behaviours they want all Marie Curie fundraisers to practice.

But where data is being truly internalised at a cultural level is in the way Marie Curie's fundraising team continually discuss what works and doesn't. Staff are interested and engaged in what the data tells them and what it really means in the context of what they already know about supporters. When data suggests something that runs contrary to assumptions, they have "robust discussions" about how to interpret the information they have. This isn't always simple: "Not all important information is captured in a database! There is a lot of value in 'latent knowledge' gained from experience; it's important not to discount this when making decisions," Meredith says.

Advice for other charities
Meredith's has advice for charities that are not yet internalising data as a driving force in their fundraising:

- **Keep it actionable.** Whenever you ask someone for a piece of information, you should be able to answer the question "what will I do differently as a result of knowing this?" Focus on the things that you can change and that will drive the most value.
- **Make it strategic.** Your data strategy supports your fundraising strategy. What are the most important decisions you'll need to take in the next year/five years? What information will you need to have to hand in order to take those decisions? Do you have it? If not, how will you get it?
- **Get everyone to own the solution.** Everyone needs

to take responsibility for making sure they have the data they need to make the decisions required in their job. It's not something that can be 100% outsourced to a database team – they are only able to build and capture what fundraisers ask them to. Help everyone to see the value of better data.

Meredith also stresses that developing a data-driven culture is something that charities of any size can embark on. Though Marie Curie's team worked with a data insight partner to develop their predictive model, Meredith says the fundamental ideas behind it are applicable to all. "Where you see how people really feel about you is in how they respond and give," she says. "If you keep tweaking, testing and refining your communications based on how people respond, you'll continuously gain a better understanding of what your supporters want and need."

Three takeaways:
1. **Build skills and collaborate:** Build skills of key team members through training, or hire people with skills in data insights if you can. Work with any other relevant teams across your organisation to provide fundraisers with the tools they need to regularly measure their efforts.
2. **Make data an on-going discussion:** Talking openly about what your data tells you helps you gain greater insight into what it means.
3. **Keep asking questions:** The learning process is never done. Continuously test and refine your approach to data collection, analysis and implementation to gain deeper insight into your supporters' wants and needs.

Connect with Marie Curie

🖥 mariecurie.org.uk
📘 /MarieCurieUK
🐦 @mariecurieuk
📌 /mariecurieuk
🇬 /mariecurie

A NOTE ON DATA PROTECTION

We've talked about how the strategic use of data can build stronger relationships with supporters and increase your fundraising success. But it is also very important to ensure that you're sticking to the rules around data protection by collecting and managing data in a lawful way.

Below, the London-based Institute of Fundraising (IoF) provides a basic overview of data protection rules and regulations. Please note that this section is specifically written for UK-based charities and social enterprises. If your organisation is based outside of the UK, we advise that you review the data protection rules in your region.

We know that fundraising is most successful when charities make a connection with their donors and establish strong relationships that engage individuals with a cause. The opportunities to use relevant data in order to give supporters the best possible experience of your organisation are huge, but it can be tricky to know what the rules are about what information you can keep on supporters, how you can use it, and what consent is needed from individuals themselves.

Asking for money and communicating with either existing or potential donors in the appropriate way is absolutely critical to the sustainability of any kind of fundraising; people need to know that their information will be kept safe, used in the right way, and have control over how it is used.

The area of data protection can seem complicated, technical, and hard to understand how to put into practice. All organisations should seek appropriate guidance from trusted sources to ensure that they are doing things properly.

The IoF's Code of Fundraising Practice sets out the legal requirements and best practice standards that we expect of fundraisers. It is underpinned by the values that all fundraising should be 'legal, open, honest and respectful' and it stresses that fundraisers must ensure they comply with all legal requirements relating to data protection. The consent of the individual must also be absolutely clear and easy to withdraw, allowing individuals to opt out of communication from charities.

By adhering to the highest standards of data protection, fundraisers can increase their supporters' trust and confidence in the work of their charities. Through setting our Code of Practice, we aim to set robust and clear standards that enable fundraisers to ask for money in a safe and legitimate way, while at the same time respecting and protecting the rights of individuals.

Data Protection Checklist

Some things to remember when approaching data:

☑ Check the guidance produced by the Information Commissioner's office (ICO) on ico.org.uk

☑ Ensure that staff members work in line with the Data Protection Act, Privacy and Electronic Communications Regulations (PECR) and the Code of Fundraising Practice by implementing robust internal policies.

☑ Check when and how consent from individuals was obtained, and what it covers.

☑ Obtain proof of consent when buying lists from third parties.

☑ Ask for consent before passing any details onto third parties.

Learn more at:

www.institute-of-fundraising.org.uk

OTHER RESOURCES

Blogs
Beth Kanter's Blog
www.bethkanter.org

Markets for Good
www.marketsforgood.org

JustGiving
blog.justgiving.com

Books
'Fundraising Analytics: Using Data to Guide Strategy'
by Joshua M. Birkholz.
Available on Amazon

'Measuring the Networked Nonprofit: Using Data to Change the World', by Beth Kanter and Katie Paine.
Available on Amazon

Resources
Data Analysts for Social Good
www.dataanalystsforsocialgood.com

Data.Gov.UK
data.gov.uk/publisher/charity-commission-for-england-and-wales

Nonprofit Research Collaborative Reports
www.npresearch.org/images/2015-reports/NRC_W2015_F.pdf

YouGov Profiler
https://yougov.co.uk/profiler#/

Video
Big Data is Better Data, Kenneth Cukier, TED Talk
www.ted.com/talks/kenneth_cukier_big_data_is_better_data

The Best Stats You've Ever Seen, Hans Rosling, TED Talk
www.ted.com/talks/hans_rosling_shows_the_best_stats_you_ve_ever_seen?language=en

Make Data More Human, Jer Thorp, TED Talk
https://youtu.be/-q6aA5qdCzU

Making Sense of Too Much Data, TED Playlist
https://www.ted.com/playlists/56/making_sense_of_too_much_data

Websites
Charities Aid Foundation
www.charitytrends.org

Guardian Voluntary Sector Network
www.theguardian.com/voluntary-sector-network

Guidestar
www.guidestar.org

The Information Commissioner's Office
https://ico.org.uk/for-organisations/charity/

The Institute of Fundraising
www.institute-of-fundraising.org.uk/home/

Stanford Social Innovation Review
www.ssireview.org

Online Tools
Survey Monkey
www.surveymonkey.com

Fluid Surveys
fluidsurveys.com/

Google refine
code.google.com/p/google-refine/

CREDITS

Written by:
Alissa Steiner, Carlos Miranda, and Erin Longhurst

Edited by:
Alisha F. Miranda

Designed by:
Roger Chasteauneuf, Fred Design
www.freddesign.co.uk

About Social Misfits Media

At Social Misfits Media we help charities and social enterprises think strategically about their digital presence. We work with our clients to better engage with those critical to their success by creating dynamic social media strategies for marketing, campaigning, and fundraising.

Social Misfits Media was founded by the team at I.G. Advisors, a strategy consultancy for the social impact space. I.G. focuses on providing philanthropy, corporate impact, and fundraising advice. Connect with I.G. Advisors at www.impactandgrowth.com or @IG_Advisors

About JustGiving

JustGiving is the world's social platform for giving. Since their launch in 2001, they've helped 22 million people raise over £2 billion ($3 billion USD) for over 20,000 incredible charities. Their mission is to connect the world's causes with people who care.

They bring the best that technology has to offer to charities worldwide, and for the last two years running have been awarded Best Giving Platform by the Institute of Fundraising.

About the Institute of Fundraising

The Institute of Fundraising is the professional membership body for UK fundraising. Our mission is to support fundraisers, through leadership, representation, standards-setting and education, and we champion and promote fundraising as a career choice.

The Institute of Fundraising is the largest individual representative body in the voluntary sector with over 5,500 Individual members and 400 Organisational members.

A big thanks!

The Social Misfits Media crew would like to thank the following individuals for their advice, help, and time. Without them, 'What's Data Got To Do With It?'' wouldn't exist.

- Adam Bryan
- Andrew Means
- Anne-Marie Huby
- Ben Worton-Hunt
- Beth Kanter
- Brent Spiner
- Brian Walsh
- Charles Wells
- Daniel Fluskey
- David Crook
- Erinn Walsh
- Kat Harrison
- Ke Huy Quan
- Lola Miranda
- Martin Ott
- Meredith Niles
- Mike Bugembe
- Mindy Fernandez
- Nik Shah
- Paul Crotch-Harvey
- Paul Jackson-Clark
- Richard Turner
- Sally Falvey
- Dr. Stephen Shepard
- Theo Miranda
- Tony Fernandez
- Victoria Vrana

Thank you as well to all those who took the time to fill out and share our data and fundraising survey.

WITH THANKS

JustGiving™
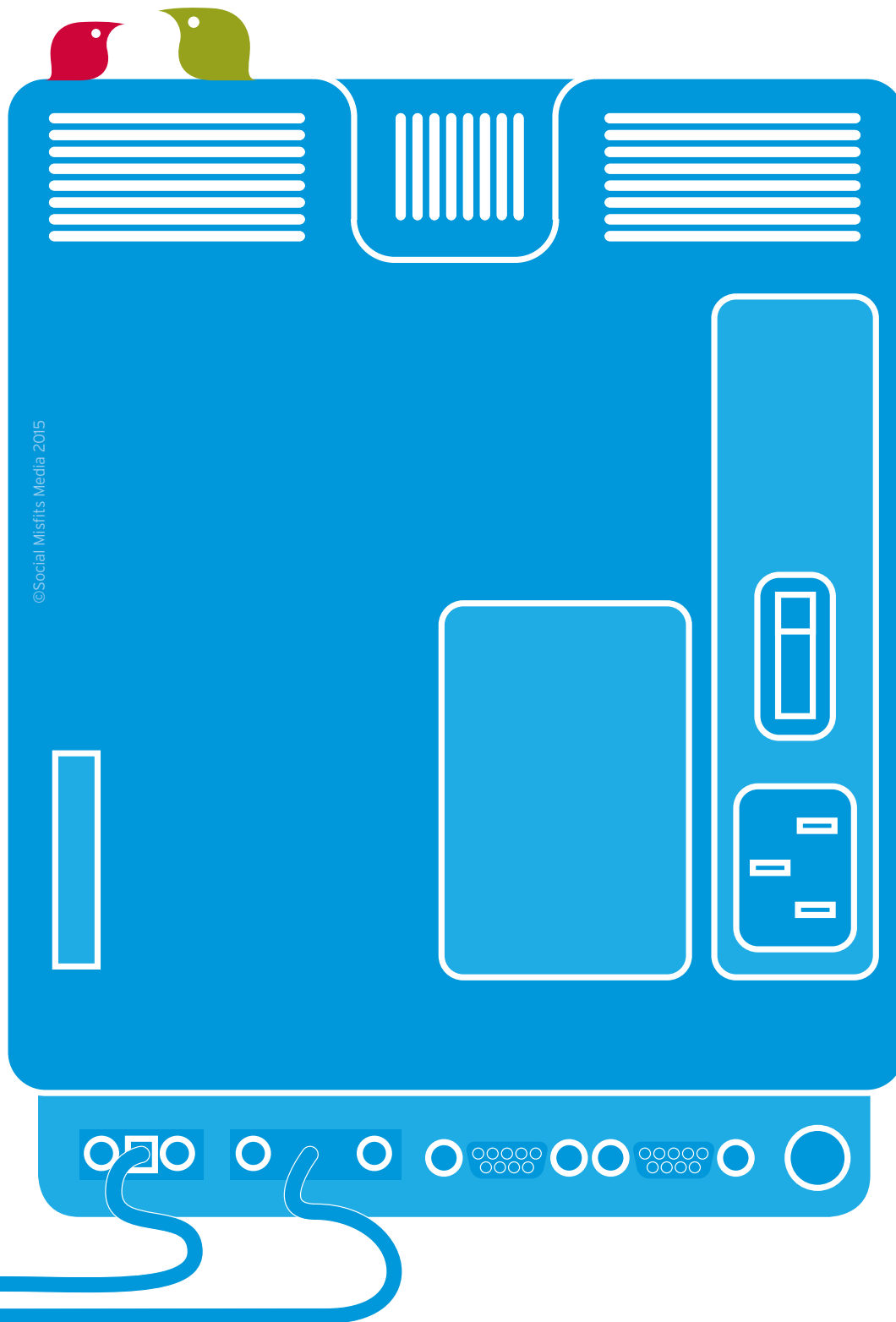
SOCIAL MISFITS MEDIA

Institute of Fundraising

justgiving.com/charities
just.ly/contact-jg
facebook.com/justgiving
@jgcauses

socialmisfitsmedia.com
info@socialmisfitsmedia.com
facebook.com/socialmisfitsmedia
@misfitsmedia

institute-of-fundraising.org.uk
info@institute-of-fundraising.org.uk
facebook.com/instituteoffundraising
@ioftweets