

Mining for Your Mission:

Using data to uncover hidden treasure

- ▶ Jerusha Schmalzel
Customer Success Manager, Arts & Cultural

Hey! I'm Jerusha

Hometown Winslow, AZ

- ▶ Based in Thousand Oaks, CA
- ▶ Spent 11+ years in the nonprofit sector, primarily fundraising for arts organizations
- ▶ My specialties include engaging Board Members in fundraising and major gifts prospecting/acquisition
- ▶ My husband and I serve at the pleasure of Tucker, the Border Collie.



What I hope you take away



The value of your data



How to create a Culture of Data



3 easy-to-find hidden gems

The desire to become a Data Driven Nonprofit!

What's your relationship
status....with your data?

Data Driven Nonprofits

accelerate change in the world by
using data to influence strategy and
inform decisions that produce value
and impact

Your data is your
most valuable
asset



Something to consider...

\$3.7 million

The average amount of untapped potential revenue in an organization

\$52

The average amount of potential increase for an annual fund gift

\$1197

The average amount of potential increase for a major gift

Something else to consider...

How much did that email address cost you?

\$50,000

Spent on marketing including-
website, newsletters, direct
mail appeals, etc.



500

New household files—
brand new email and
physical address you can
appeal to



\$100

Per new housefile



**Keep it in
a safe,
secure
place**



**Invest in
its health
and
upkeep**



**Put it
to work
for you**

 Data management software is a must!

 Security should take high priority

 Accessible to ALL pertinent staff



**Keep it in
a safe,
secure
place**



Data is ever changing



Outdated addresses cost money-\$21 million a year

- Run NCOA 2x a year minimum
- Address Service Requested



Feed your data a balanced meal

- Demographic-Organic or Purchased
- Email, physical, bio, phone



**Invest in
its health
and
upkeep**



Tell your story- beware of:

- True, but useless
- Out of context



Segment, Segment!



Wealth screening/rating

- NOZA database
- Rating vs. screening



**Put it
to work
for you**

Create a Culture of Data at your organization





**Data is
everyone's job**

**Silos kill data-
Get buy in!**

**Believe your
data, build trust**

**Feed your Board
healthy,
nutritious data**

**If it's not in the
database, it
didn't happen**

Find your hidden
treasure



Tools you'll need:

- Giving history (more than 10 years)
- Contact information

Tools you'll want:

- Demographic info
- Asset listing
- Volunteer hours/status

What to segment:

- 10+ years of giving 2 gifts a year
- Avg. gift amount \$25
- Age over 55 (if you have it)
- Look for holiday giving and In Memoriam



Planned Giving

Tools you'll need:

- Giving history
- Online giving data
- Current email-physical address ok

Tools you'll want:

- Dynamic email marketing
- Credit card updater
- Volunteer hours/status

What to segment:

- Multiple gifts per year (easy!)
- Anyone who gives with a credit card and/or online
- 1st time donors
- Attendance (for arts & culture orgs)



Sustaining Gift

Tools you'll need:

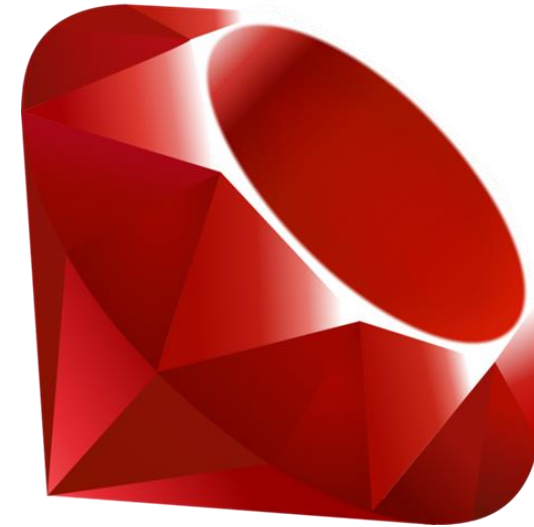
- Giving history
- Wealth info
- Pipeline/proposal management tool
- Dedicated relationship manager

Tools you'll want:

- Predictive analytic software
- Outside giving info
- Volunteer hours/status

What to segment:

- \$500 donors
- Made 1st gift of \$100+
- \$125 donor for 7+ years
- Attendance (for arts & culture orgs)



Major Gift



VOLUNTEERS



55+ age



**Dedicated
to your
sustenance**



**Project
oriented**

Resources

TechSoup-Donor Management Software Comparison

www.techsoup.org

	Bloomerang	Community Enterprise	DonorPerfect Online	eTapestry	Exceed!	Fundly CRM	Little Green Light
PROGRAM AND ELIGIBILITY INFORMATION							
Donation program on TechSoup	Bloomerang	CitySoft	DonorPerfect	Blackbaud	Telosa	NonProfitEasy	Little Green Light
Product website	http://bloomerang.co	http://www.citysoft.com/	http://www.donorperfect.com/	https://www.blackbaud.com/fundraising-crm/etapestry-donor-management	http://www.telosa.com/software-non-profits/	http://www.nonprofiteasy.com/	http://www.littlegreenlight.com/
Offer available to all TechSoup 501(c)(3) org types and libraries?	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Offer available to organizations with maximum annual budget of	\$250,000 or less <small>(larger organizations with budgets above \$250,000 may contact Bloomerang directly for a 10% discount)</small>	\$500,000 or less	\$250,000 or less for donated offer under \$1 million for access to discounted rates	budgets of any size	\$50,000 or less for donated Exceed! Basic offer \$50,001 to \$500,000 for discounted Exceed! Basic or Exceed! Premier offers	\$100,001 to \$1.5 million	\$100,000 or less <small>(larger organizations can obtain a \$125 discount; see the Little Green Light program page)</small>
Offer available to current or former customers?	No	Yes	No	No (unless the original subscription was obtained through TechSoup between 4/1/2012 and 4/4/2013)	No (users with a previous version who wish to upgrade can contact Telosa directly)	No	No
OFFER DETAILS							
Product name	Bloomerang 1-year subscription	Community Enterprise Full License	DonorPerfect Online for Growing Organizations, 1-year subscription DonorPerfect Online 1-Year initial subscription – access to discounted rates	eTapestry Starter Package 1-year subscription	Exceed! Basic Exceed! Premier	Fundly CRM Easy Start, Easy Grow, Easy Go, or Easy Pro Plan 1-year subscriptions (discounted)	Little Green Light Donor Management CRM, Initial Subscription
Online (cloud-based) or on-premises software	Online	On-premises or hosted online by CitySoft for additional fee (recommended by CitySoft)	Online	Online	On-premises	Online	Online



DATA ENRICHMENT

That keeps you in the black.

The screenshot displays the eTapestry Data Health Scorecard. The top navigation bar includes 'Home', 'Accounts', 'Giving', 'Communications', 'Queries', 'Reports', and 'Management'. The main content area is divided into two sections: 'AddressFinder' and 'Wealth Rating'.

AddressFinder Section:

- Header: **Data Health Scorecard**
- Sub-headers: **Addresses** (selected), **Social**
- Callout: **\$2,294** wasted per mailing
- Text: **Why is it time to run AddressFinder™ (NCOA®)?**
- Text: eTapestry analyzed all **10,188** of your accounts on **2/12/2016**. We found accounts in your database whose addresses need attention (based on primary persona). Based on an average cost of \$1.00 per mailing, that means nearly \$2,294 in mailings will not arrive to their intended recipient.
- Text: eTapestry recommends running **AddressFinder™ (NCOA®)** within 95 days of a mailing to help avoid fees and qualify for discounts.

Wealth Rating Section:

- Header: **Data Health Scorecard**
- Sub-headers: **Addresses**, **Social**, **Wealth Rating** (selected)
- Alert: You have not run the **Wealth Rating** service in six months. Run this process to get up-to-date scoring for the people in your database.
- Section: **Last Run Summary**
- Table:

Last Run	Total Rated Prospects	New Constituents Since Last Run
4/17/2016 <small>Run Wealth Rating</small>	65,450 <small>Based on Base - All Constituents</small>	1,056

- Section: **Wealth Rating Breakdown**

56	★★★★★
96	★★★★☆
542	★★★☆☆
8,643	★★☆☆☆
56,113	★☆☆☆☆

- Section: **Wealth Rating Links**

 - Queries
 - Query Category
 - Help
 - [Learn more about Wealth Rating](#)

Integrated AddressFinder

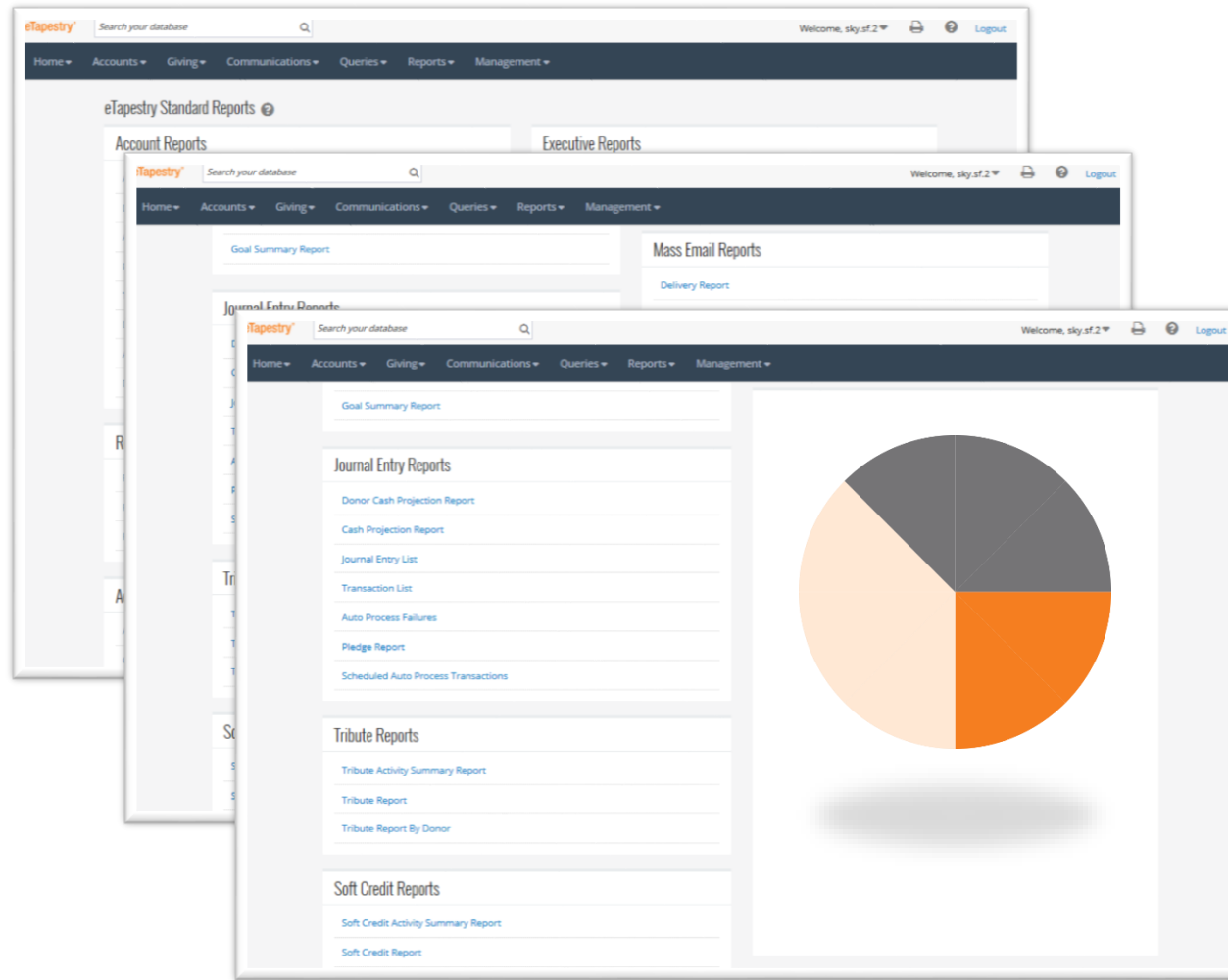
- Included with your eTapestry subscription to ensure you don't waste money on mailing to bad addresses

Integrated Wealth Ratings

- Also included with your eTapestry subscription to help you target donors with messaging specific to donor's capacity to give

HELLO FUNDRAISER—WHAT IS YOUR QUERY?

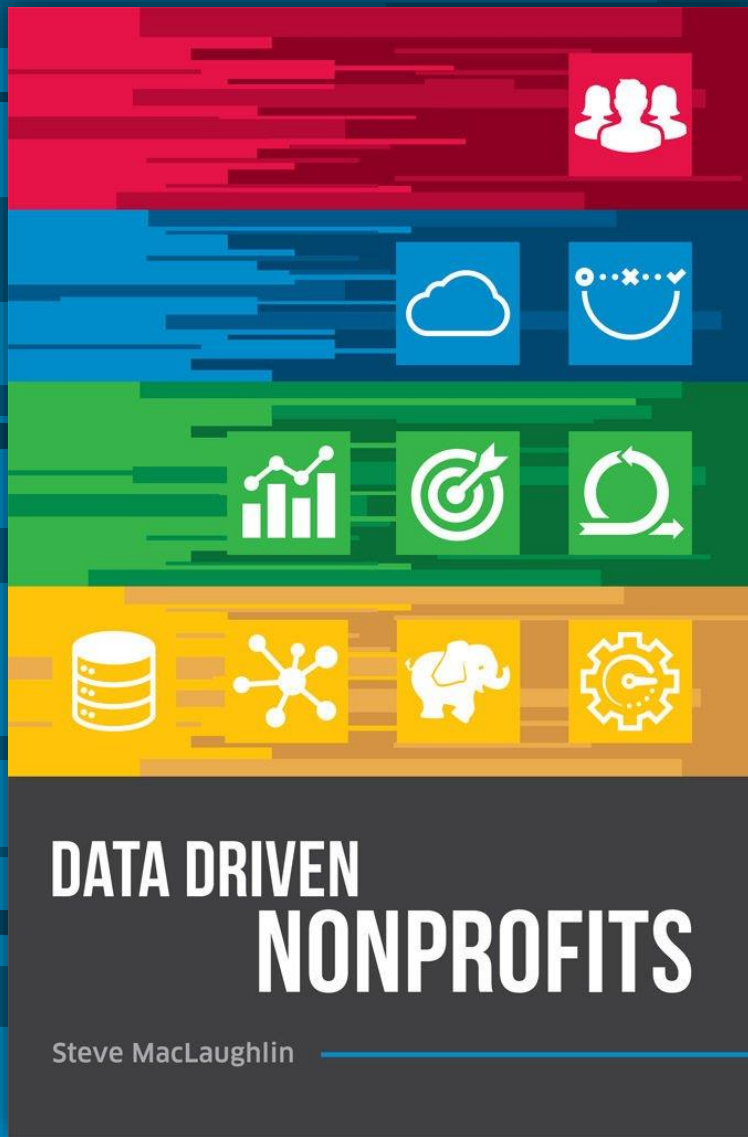
Welcome to intuitive and flexible reporting.



Easy just got easier.

- Easy to use reporting allows users to get info they want out of system quickly
- Intuitive, smart reporting drives fundraising success and tells users who needs to be solicited or thanked
- Flexible, customizable dashboard puts pertinent information at users' fingertips

Creating charts and impactful visuals is fast and intuitive.



#1 Best Seller

in Nonprofit Organizations & Charities

#DataDrivenNonprofits

Thank you!

Please stay in touch—let me know how it goes!



Jerusha Schmalzel

jerusha.schmalzel@blackbaud.com

 **@jschmalzel**