



Pee Wee's Big Data Adventure: Building Your Nonprofit Data Playhouse





Megan Cox
**Director of Business Development
& Strategy at Totem**



Maureen Wallbeoff
**Nonprofit Digital Strategist
& Technology Coach**

Our Agenda



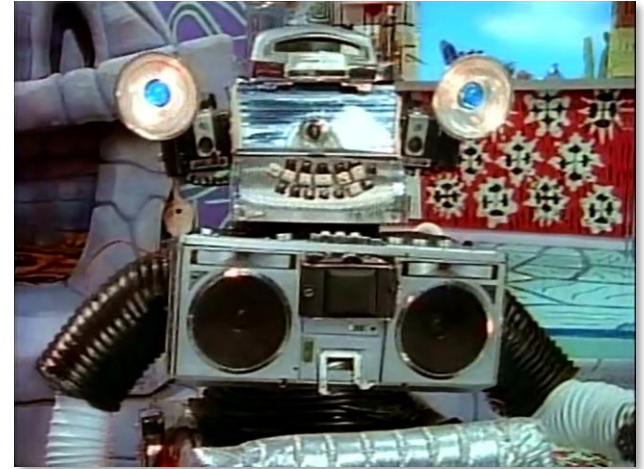
- **Why Is Data So Challenging?**
- **Common Data Pain Points**
- **Map Your Data Ecosystem**
- **Three Quick Data Wins**
- **Open Q & A**

Why Is This Data Stuff So Wacky?



Data Management Isn't Easy

- Data silos
- Limited budget
- No formal training
- Staff turnover
- Technology is constantly evolving
- Unclear goals



Our Data Management Fantasy



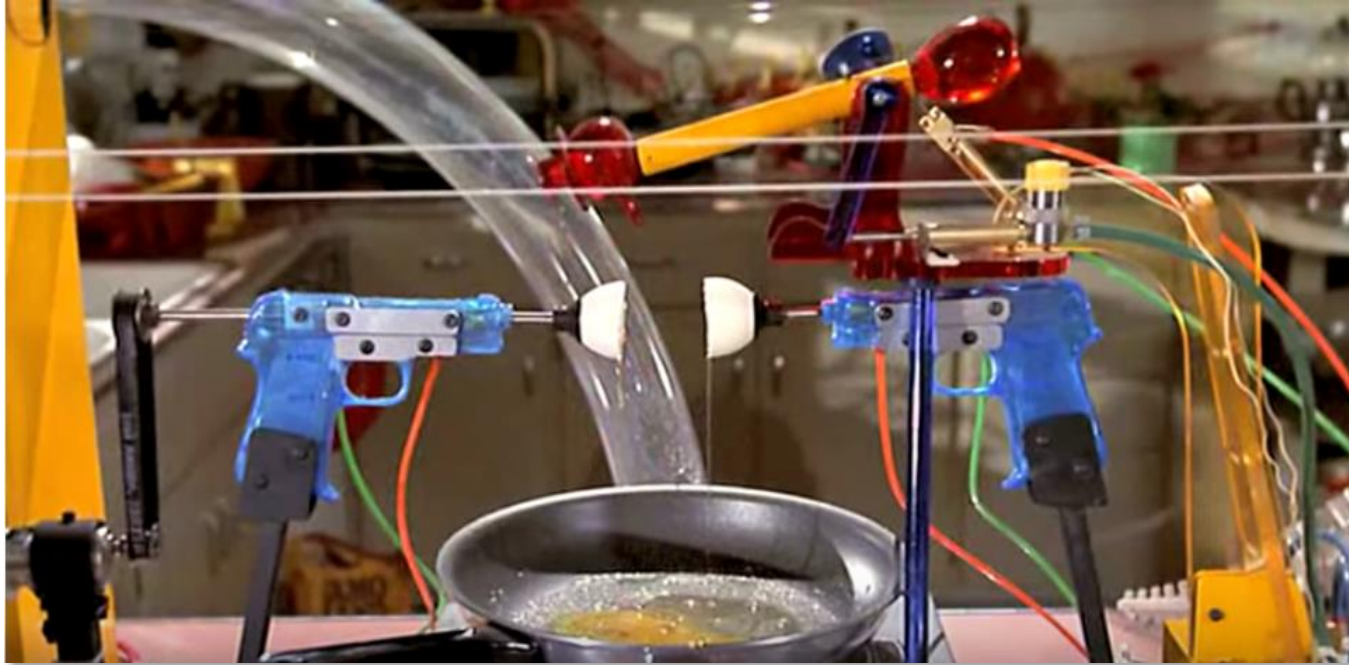
**Mekka lekka hi,
mekka hiney ho!**

**Your data will always be
clean and equalized
between systems!**

What Data Management Feels Like

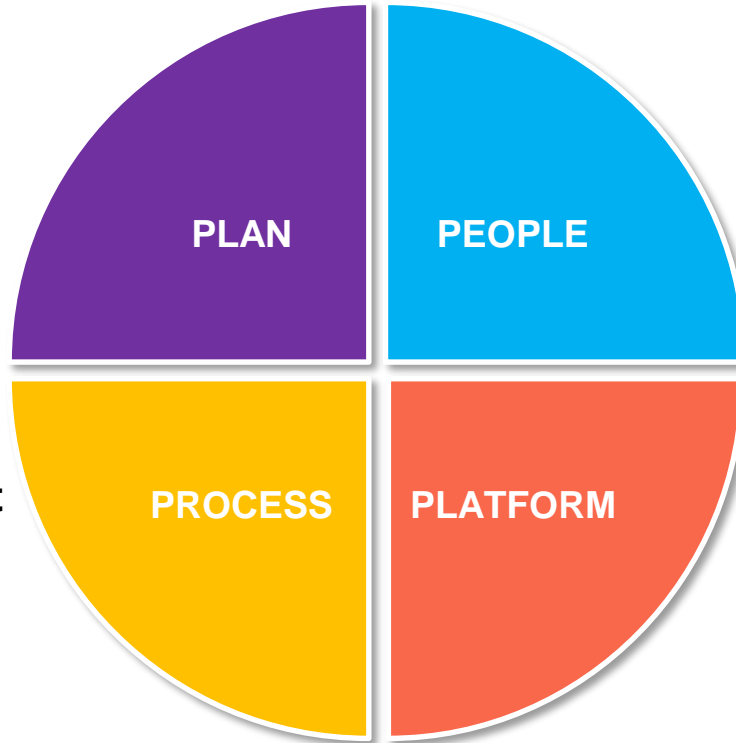


What Data Management Should Be Like



Make Progress With The Four Ps

You need to be working with a solid plan including defined goals and objectives.

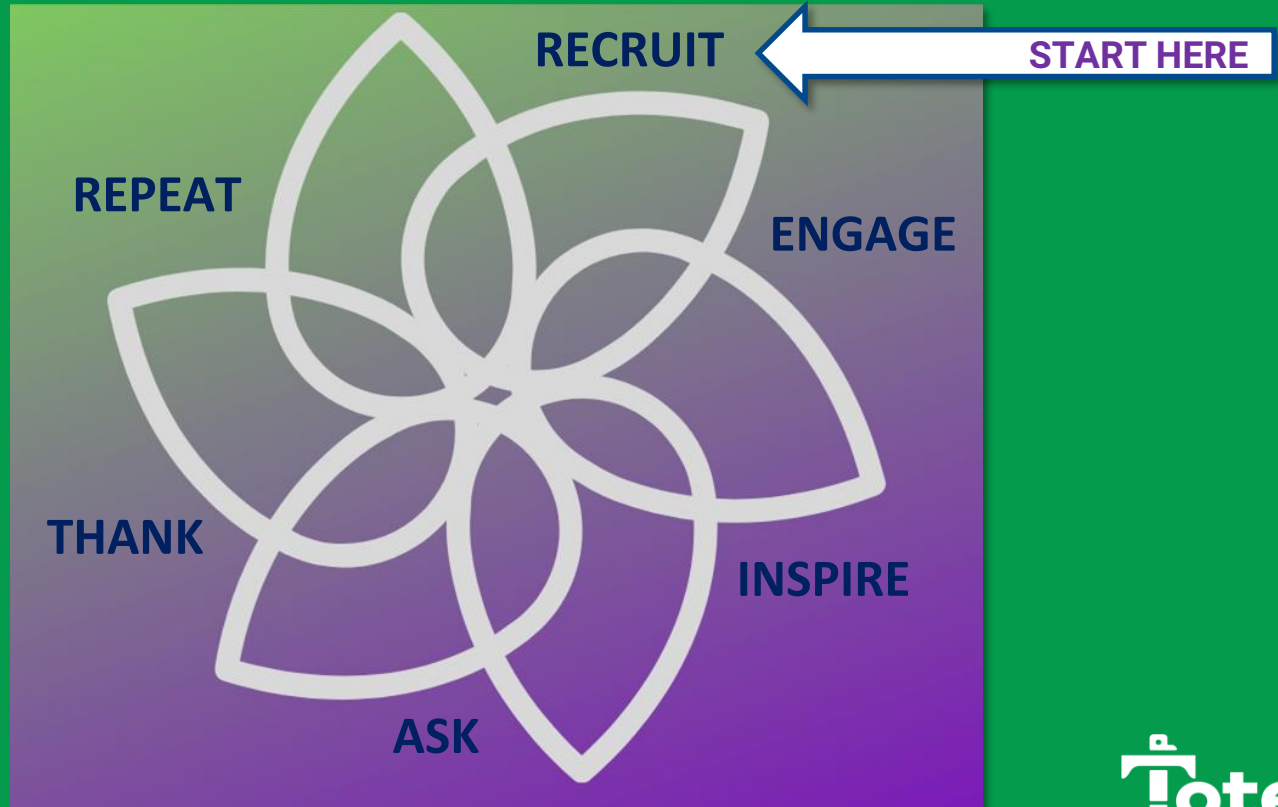


You need the right number of people on your team and they need the right skills.

Business processes must be efficient, documented, understood, and used by everyone.

You need to use the right platforms and systems to get the job done efficiently.

Data Helps Organizations Grow



Common Data Issues

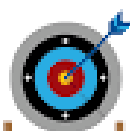
Real Client Quotes

- “My data is in 5 different places”
- “Mary used to do it this way but I do it this way” or “My data isn’t organized in a way I understand” ... “so now I don’t trust my reports”
- “What should I even be looking at? Where do I start?”
- “Our goal is to raise 50K more this year”



Missed Opportunities

- **Not getting rid of the 5 platforms you're currently using, even though they're not working for you!**
- **Invest in workflows!**
- **Segment your constituent base!**
- **Look at your current data to inform your decisions!**



Donor Ladder of Engagement

- 9 Prospect hosts a fundraiser for the candidate that nets **\$7,500**
- 8 Coffee with candidate to explore **opportunities for support**
- 7 Prospect gives **\$250** for fundraising event
- 6 Candidate calls to **invite donor** to a fundraising event
- 5 Campaign sends **thank-you letter**
- 4 Prospect receives an email & gives **\$25**
- 3 Prospect signs up for **campaign email list**
- 2 **Candidate calls** and introduces themselves
- 1 Donor research identifies person as a **donor prospect**

<https://traindemocrats.org/lesson/the-ladder-of-engagement/3-7-donor-ladder-of-engagement-2/>

Back to those real client quotes...

- **Case study: a medium-sized foodbank**

Map Your Data Ecosystem



Step 1: Take An Inventory of Your Systems

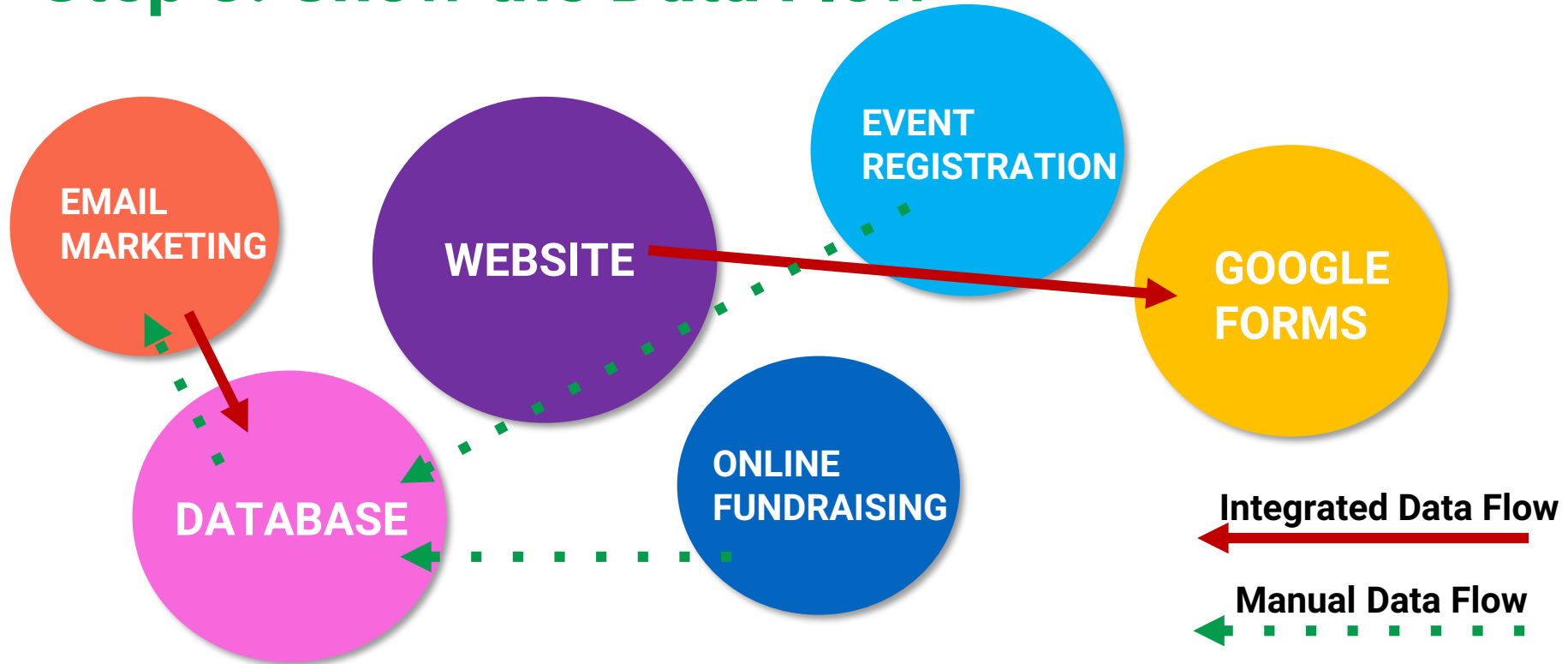
- Gather basic info about every system
- Document the Name | Owner | Cost | Function
- Add Pros | Cons | Overall System Health



Step 2: Draw Your Map



Step 3: Show the Data Flow



Where Are The Issues?

- **Data Silos**
- **Manual Processes**
- **Redundant Tools**
- **Duplicate Records**
- **Gift Coding**
- **Action Tracking**
- **Limited Data**



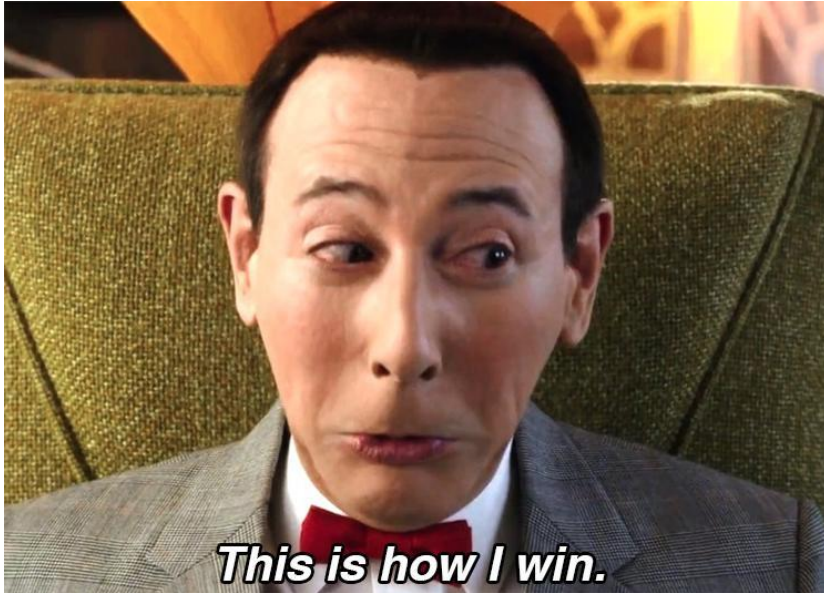
Three Quick Data Wins



1. Fix Data Integration Dead Spots



2. Focus on Strategic Data



- Non-donors
- Lapsed donors
- New donors
- Segmented lists with a marketing plan for each
- YoY Measurement

3. Evaluate The Systems You're Using Now

- **Data Silos**
- **Manual Processes**
- **Redundant Tools**
- **Duplicate Records**
- **Gift Coding**
- **Action Tracking**
- **Limited Data**



Open Q&A





We're here to help the helpers

Thank You!

Megan Cox

Director of Business Development & Strategy

megan@totemfgf.com

830.305.5950

www.toteminsights.com

Maureen Wallbeoff

Practical Wisdom for Nonprofit Accidental Techies

maureen@meetmaureen.com

508-744-3366

www.meetmaureen.com