

Key questions every charity should ask...



An Ambulance Association Conference 2011

knowing your donors
managing your data
Steve Mason
donorflex Client Development Consultant



Data management

you need to have...
... a maintenance strategy

Data Matrix
A data matrix is a grid of data points, often used in data analysis and machine learning. It consists of rows and columns of data points, where each row represents a different instance of the data and each column represents a different feature or attribute.

Good data will...
- provide accurate insights
- help you make better decisions
- improve your operational efficiency
- reduce the risk of errors and fraud

Bad data will...
- lead to incorrect conclusions
- waste time and resources
- damage your reputation
- increase the risk of legal action

not forgetting
- data security
- data privacy
- data integrity
- data availability

... a maintenance strategy
- regular backups
- data recovery plans
- disaster recovery plans
- data archiving

Air Ambulance Association
Conference 2011



knowing your donors
managing your data



Steve Mason

donorflex Client Development Consultant

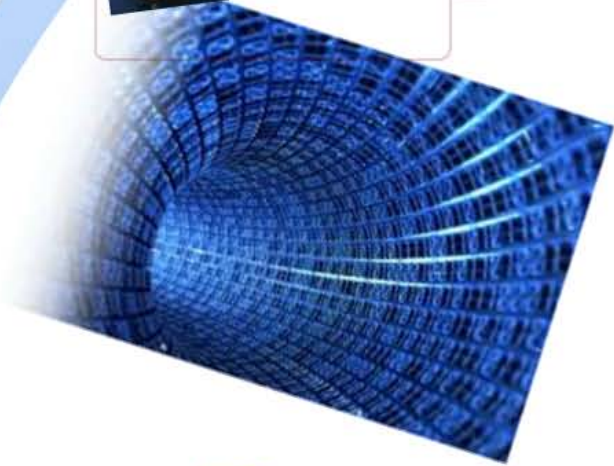
Information is at the heart of any marketing activity. Not only that: it's also the basis on which a company's marketing either succeeds or fails

- Regis McKenna (consultant, Silicon Valley)



Above all, get obsessed about data

- Jerry Yang (Yahoo founder)



Where does it come from?

How is it collected?

Where should it go?

How good is YOUR data?

Are it correct in the first place?

The problem never goes away

- Royal Mail changes 100k+ postcodes each year
- People move
- People die
- Companies are taken over

Is duplication an issue?

Data management

you need to have...

... a maintenance strategy

- EXTERNAL
- Telephone preference service
 - Mailing preference service
 - E-mail preference service
 - Bereavement register
 - RM National Change of Address
 - Gone away suppression file
 - Business suppression file
 - Online cleaning

... not forgetting

- INTERNAL
- Agreed formal data entry procedures
 - Donor audit procedures, duplicate-checking enquiries, donor consolidation tools
 - Donors - questionnaires

Bad data will...

- Upset donors and supporters
- Portray a poor image
- Produce incorrect selections for campaigns
- Waste time and money
- Result in poor return on investment
- Lead to inaccurate, misleading analysis of donors for future planning

Good data will...

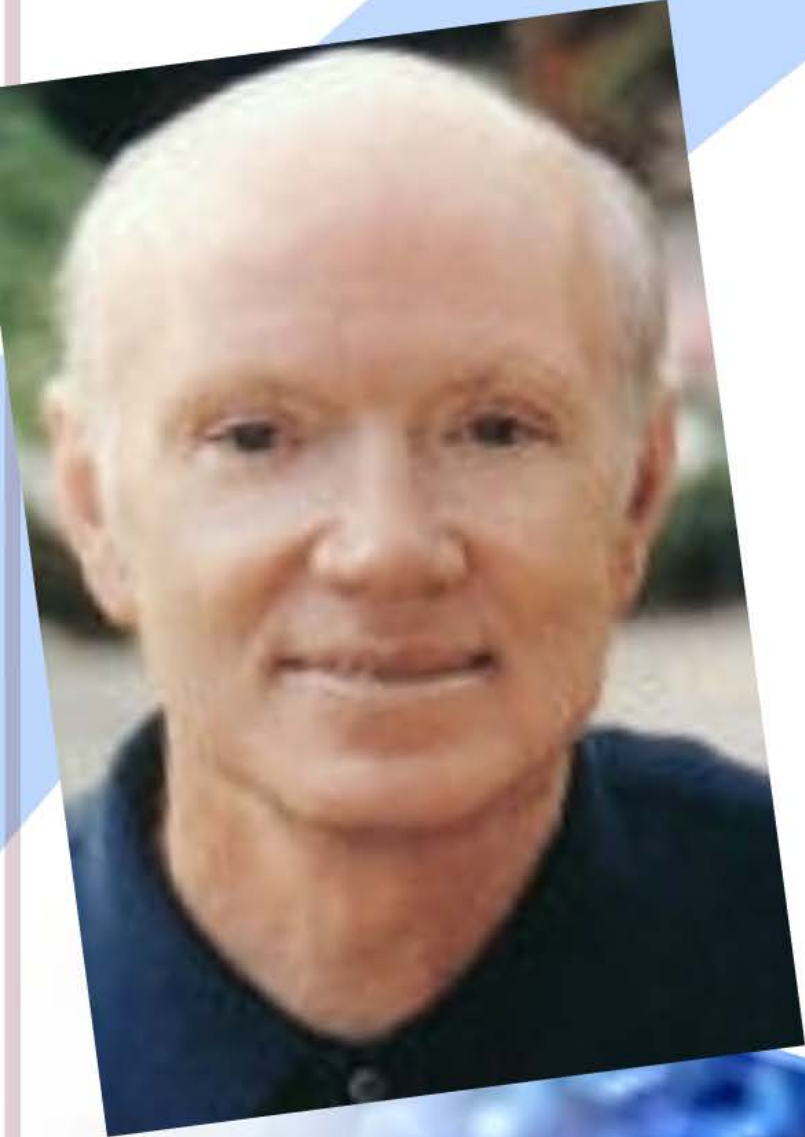
- promote smarter targeting
- convey personal relevant message to each donor
- produce a higher response
- improve donor acquisition
- achieve a better ROI

CONCLUSION?...

... DATA MATTERS!

- You should regard DATA as a prime organisational resource
- You should establish a DATA POLICY
- You should commit to a QUALITY ASSURANCE standard that defines the needs of the organisation





Information is at the heart of any marketing activity. Not only that: it's also the basis on which a company's marketing either succeeds or fails

- Regis McKenna (consultant, Silicon Valley)



As a rule, he or she
who has the most
information will have
the greatest success
in life

– Benjamin Disraeli





Above all, get
obsessed about data

– Jerry Yang
(Yahoo founder)



Where does it come from?





How is it collected?



Where should it go?



blackbaud™

 **asi** advanced solutions international

 **iris**
NFP SOLUTIONS Not-For-Profit



How good is YOUR data?

Name (Mr/Mrs/Miss) None for Initials M
Address Apartment 2, Springfield Rd,
Madon, Birkdale Postcode WA2 6JA

Date of Birth 17.01.31 Tel No. _____
Occupation Social Worker/Home help
Mtg Mailing No. _____ Policy Renewal Date _____

No. of Bedrooms 3

Type of Property:
Detached House Semi-detached House
Terraced House Detached Bungalow
Semi-detached Bungalow Flat/Maisonette
Other (please specify) _____

Approximately when was it built:
Pre 1920 1920-1945 1946-1979 1980-Present

Please tick the type of cover for which you would like a quotation
Buildings Cover Home Contents Cover Both

Answer YES to the following and you could save up to 15% on your Contents premium.

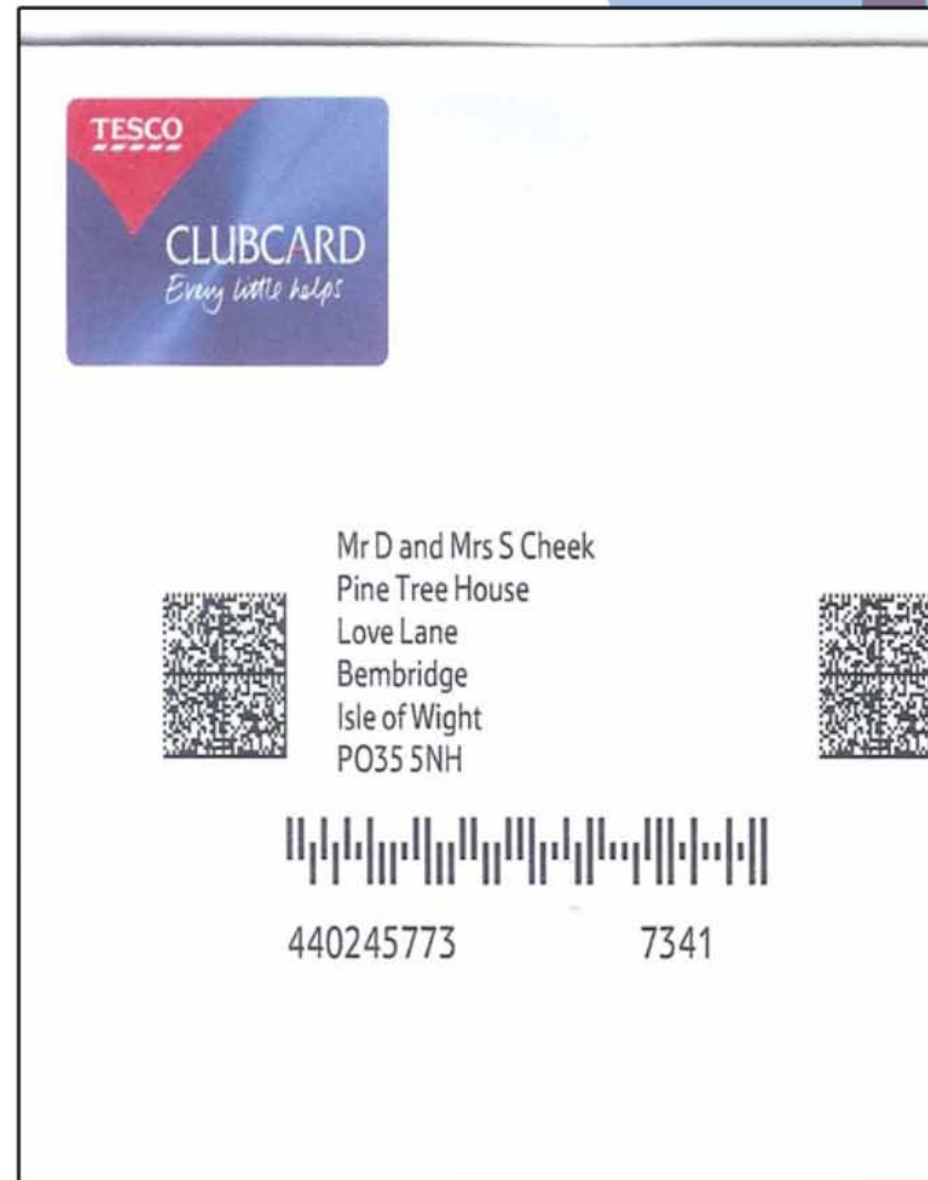
Does your home have an annually maintained burglar alarm? Yes No
Is a 5/lever mortise lock fitted to the final exit door? Yes No
Are all other external doors fitted with key-operated locks or bolts? Yes No
Are secure key-operated locks fitted to all accessible windows? Yes No
Are you an active member of a Police Approved Neighbourhood Watch Scheme? Yes No

For insurance on listed buildings, those of non standard construction, flats and maisonettes or if you are the landlord of the property to be insured, please telephone 0800 414 525 ext 3561 for your quote or tick the box for further details

H3561

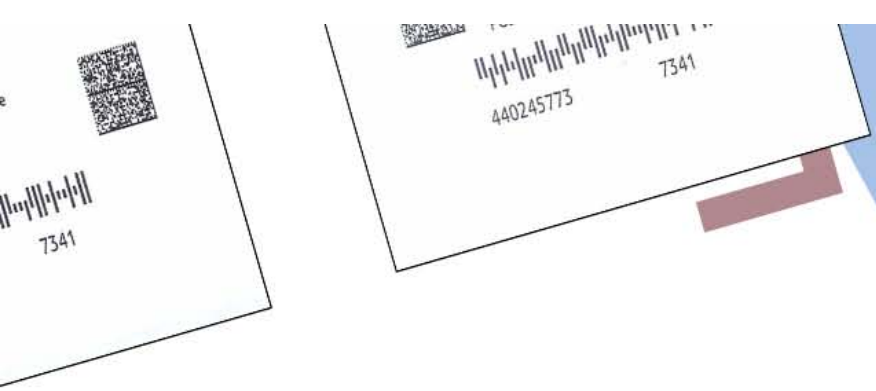
Was it correct in the first place?

Is duplication an issue?



The problem never goes away

- *Royal Mail changes 150,000+ postcodes each year*
- *Seven per cent of people move house*
- *People marry*
- *People die*
- *Companies are taken over*



you need to have...

... a maintenance

The slide features a large, light blue circular graphic on the left side, partially overlapping a larger, darker blue curved shape that extends from the top right towards the bottom center. The text is centered within the white space of the circle.

... a maintenance strategy

EXTERNAL

Telephone preference service

Mailing preference service

E-mail preference service

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... not forgetting

INTERNAL

Agreed formal data entry
procedures.

Donor audit procedures, duplicate-
checking enquiries, donor
consolidation tools

Donors ~ questionnaires

Bad data will...

- Upset donors and supporters
- Portray a poor image
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however...

Good data will...

- *promote smarter targeting*
- *convey personal relevant message to each donor*
- *produce a higher response*
- *increase donor acquisition*
- *improve cost-effectiveness*
- *achieve a better ROI*

CONCLUSION?...

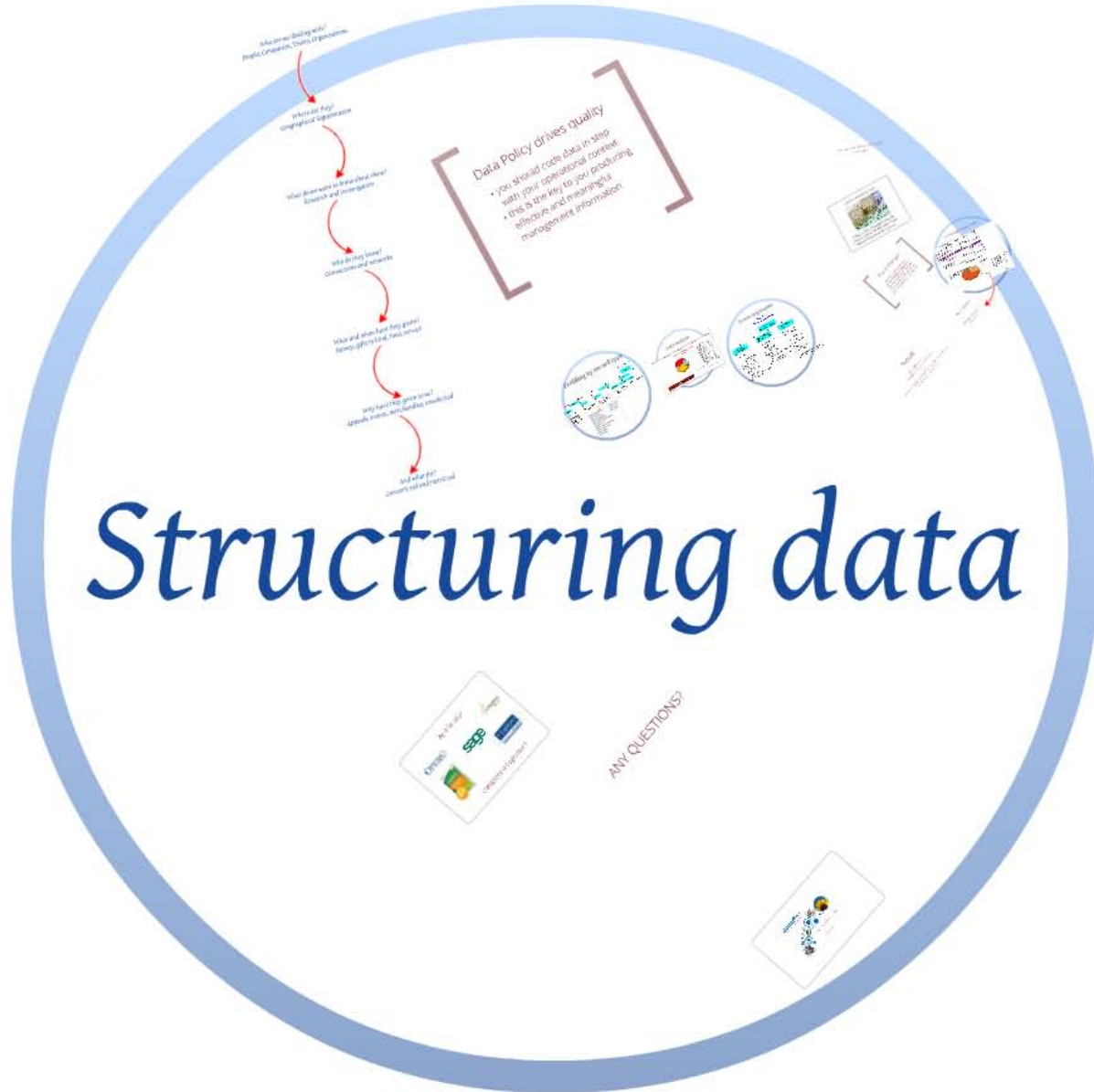


...DATA MATTERS!

- You should regard DATA as a prime organisation resource
- You should establish a DATA POLICY managed on a shared basis
- You should commit to a QUALITY ASSURANCE standard that befits the needs of the organisation



Key questions every charity should ask...



Key questions every
charity should ask...



*Who are we dealing with?
People, Companies, Trusts, Organisations*





*Where are they?
Geographical Segmentation*





*What do we want to know about them?
Research and investigation*





*Who do they know?
Connections and networks*





*What and when have they given?
Money, gifts in kind, time, service*





*Why have they given to us?
Appeals, events, merchandise, unsolicited*





*And what for?
Unrestricted and restricted*

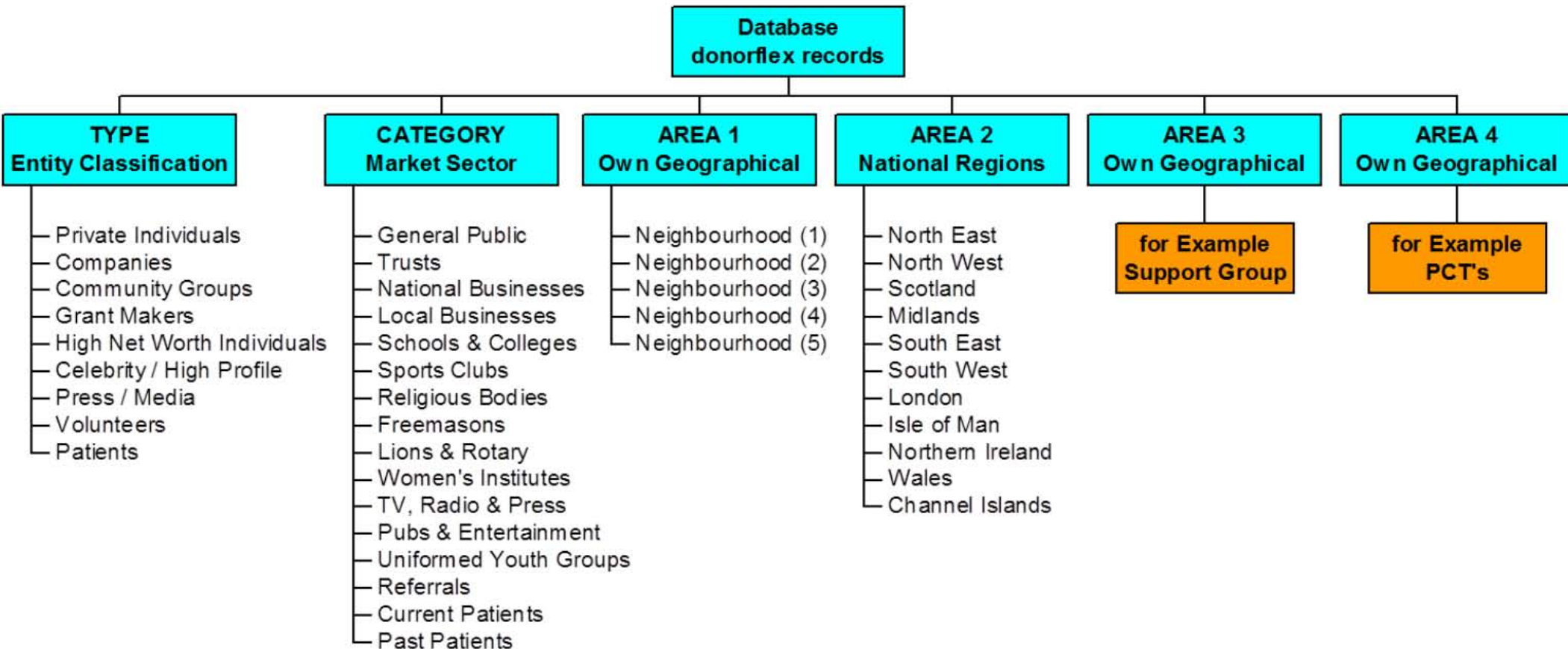


Data Policy drives quality

- you should code data in step with your operational context
- this is the key to you producing effective and meaningful management information

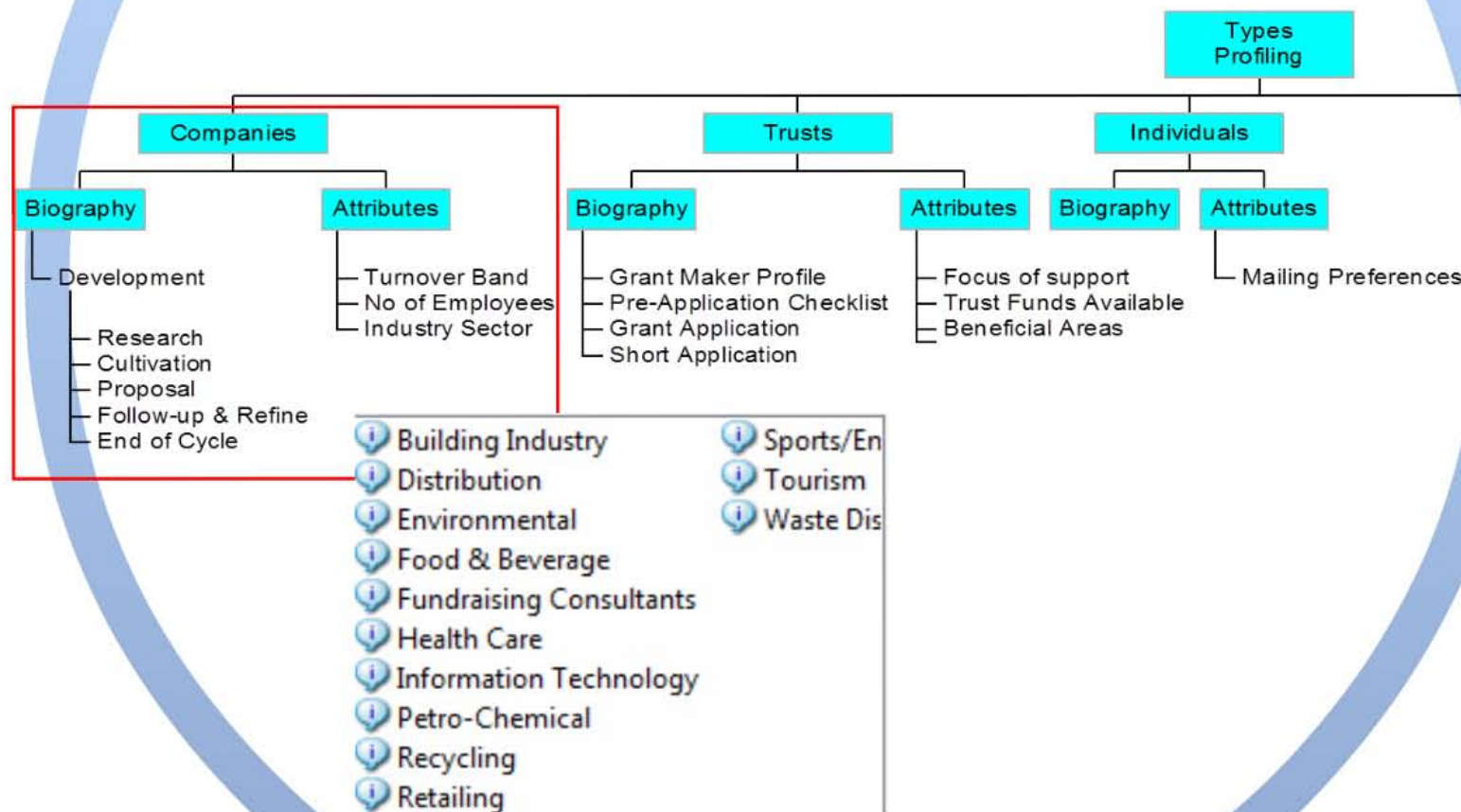
Typical demographic outline

Data Policy Organisational Landscape



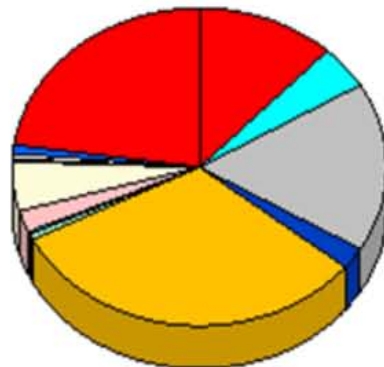
Profiling by record type

Profiling Templates



Data analysis

Total Worth of Category Sectors
Cumulative £'s



ANONYMOUS	0.1%
Business - Ltd Company	11.8%
Business - Other	0.0%
Business - Partnership	0.0%
Business - PLC	4.5%
Business - Sole Trader	0.0%
Charitable Trust	17.1%
Company-Staff Fundraising	0.0%
Educational Body	2.2%
General Public	31.7%
Government/Public Sector	0.5%
Legator	0.5%
Membership Organisation	2.0%
Other Group	5.3%
Press & Media Owner	0.0%
Press & Media Publication	0.0%
Religious Organisation	0.6%
Sports Club/Group/Assoc	1.0%
Youth Group/Club/Org	22.7%
Total:	100.0%

produced by don orflex

Big Picture ~ Category Summary

Monday, November 2, 2009

Structuring income

Data Policy
Financial Landscape



Income & Related Expenditure

Sources Initiative / Influence

- In Memoriam
 - Patient Tributes
 - Other Tributes
- In Lieu of Gifts
- Sponsored Events
- Organised Events
- Collections
- Mailing Campaigns
- Trading
- Legacy Promotion
- Committed Giving Promotion
- Lottery Promotion

Income Stream Channel of Giving

- Regular Giving Plan
- Donation
- Pledge
- Organised Event
- Lottery
- Collecting Box
- Membership
- Donation with Membership
- Merchandise
- Donation with Merchandise
- Gift Aid Repayments

Applications Purpose of Giving

- General Fund
- Capital Appeal
 - Building
 - Fixtures & Fittings
 - Services
- Designated Funds
 - Research
 - Staff Training
- Restricted Funds
 - Specific Equipment Purchase
 - Specific Development Programme

	0.1%
any	11.8%
	0.0%
ip	0.0%
	4.5%
er	0.0%
	17.1%
raising	0.0%
	2.2%
	31.7%
ector	0.5%
	0.5%
ation	2.0%
	5.3%
	0.0%
ation	0.0%
on	0.8%
ssoc	1.0%
g	22.7%
	100.0%



Are you taking data seriously
enough?

Here's a cautionary tale!



In April, 2010, the opportunity for back-claiming Gift Aid from HMRC reduced from six to four years...

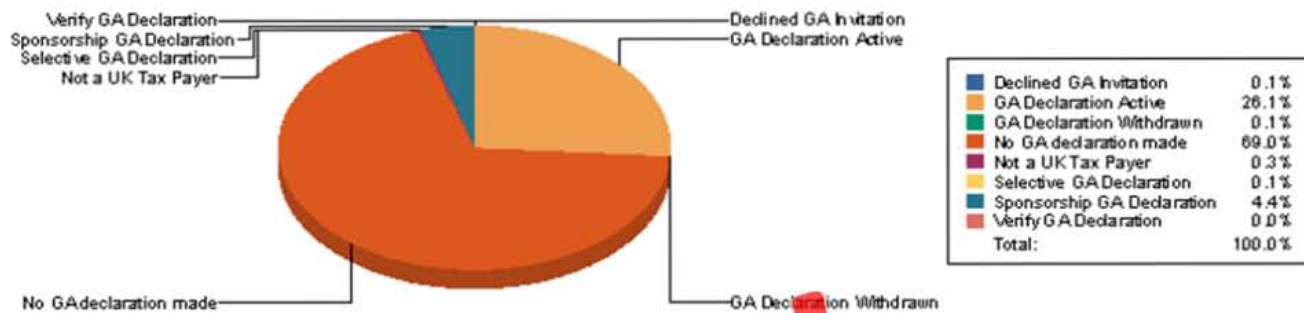
The challenge?

donorflex advised clients to identify 'Individual' supporters who HAD NOT made a Gift Aid declaration BUT who HAD made donations in that two-year period

Gift Aid declaration ratio

Total	21,928	£3,803,344	100 %
Declined GA Invitation	22	£6,339	0%
GA Declaration Active	5,721	£1,258,664	26%
GA Declaration Withdrawn	11	£2,768	0%
No GA declaration made	15,124	£2,301,223	68%
Not a UK Tax Payer	58	£19,400	0%
Selective GA Declaration	28	£3,983	0%
Sponsorship GA Declaration	963	£210,694	4%
Verify GA Declaration	1	£274	0%

Gift Aid Declaration Index



produced by donorflex

The Potential

Gift Aid recovery of
£82,002.15



Result!

£42,500 tax claim

£3,500 additional donations

AND

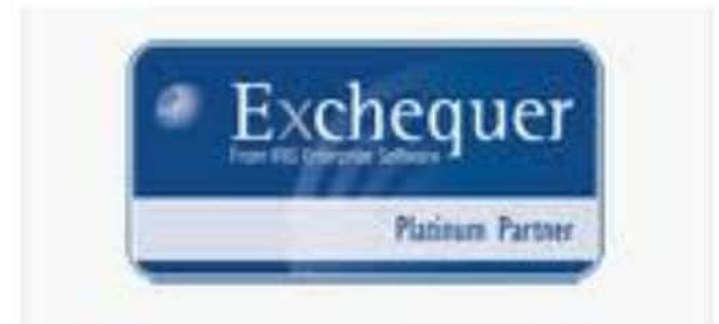
improved engagement with donors who hadn't been contacted for some time!

And finally?

OPERA^{II}TM



sage



complete integration!

ANY QUESTIONS?

donorflex

one cause, one database



inspiring software for charities

Thank you