

# Fundraising Analytics worksheet

Use this worksheet to determine the next – or first – steps in your data-driven fundraising insights journey.

## STEP 1 IDENTIFY A PROBLEM

By focusing on solving specific issues, your analytics will be actionable and valuable. You'll get return on investment faster as you use them more often to provide a better supporter experience and foster stronger donor relationships.

1. What's something that requires **a lot of time, or costs a lot of money**?
2. What goal are you working toward by improving performance in this area?
3. What one **key metric** needs to shift for that to happen?

For example, let's say you're **spending a lot of time** and effort acquiring new supporters every year, and want to **be more sustainable in your fundraising**. One way to do that would be to **reduce casual supporter** attrition and encourage these existing donors to continue their support of your cause, potentially upgrading them to a regular giving program.

## STEP 2 IDENTIFY THE INSIGHTS NEEDED TO SOLVE THE ISSUE

Insights are what drive action, so it's helpful to frame the conversation in terms of what action you ultimately need to take.

*"If we knew [information about the supporter], then we could [take a particular action]."*

For reducing casual supporter attrition:

- a) If you knew what made a casual supporter leave, you could adjust your activities
- b) If you knew what behaviour a casual supporter exhibits before they leave, you could intervene before it happens
- c) If you knew what encouraged a casual supporter to become a regular giver, you could replicate that activity to drive higher regular giving participation

## STEP 3 IDENTIFY THE DATA THE INSIGHTS WILL USE

Determine what data points, or combination of data points analysed together, gives you the information you need from the insights statement above.

To know what makes supporters leave, how their behaviour might indicate their likelihood of leaving, and what encourages them to stay, you need:

- Campaign engagement
- How often, how much, and how recently supporters donate (RFM)
- Supporter segments derived from RFM

In the right hand column, we have outlined some common information you probably already have, and some you can get from elsewhere.

### Information you already have:

- Donation amounts
- Donation dates and times
- Name
- Address
- Birthdate
- Email
- Phone
- Email campaign activity
- Gender
- Fundraising / membership segment

### Information you can acquire:

- Demographic & behavioural segmentation
- Affluence indicators
- Births, deaths, and marriages information
- Company data
- Market sizing information

---

It's important to ask yourself whether you have the internal resources necessary to drive this solution. If the answer to any of the below questions is no, it may be time to outsource.

---

Do you have a platform for actionable insights?

---

Do you have the skills to combine and analyse reporting data?

---

Do you have clean data to use for trustworthy analytics?

---

Now you, or your insights delivery partner, can gather the data (making sure it's accurate and trustworthy!), create a purpose-driven analytics dashboard, and use actionable insights to drive better fundraising outcomes.

