TIP SHEET

10 Key Questions to Align Your Fundraising Data to Your Mission Goals

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Data for data's sake is not useful. Data to learn a better way to serve your mission is magical. How is this accomplished? Define your organizational goals, choose wisely what you monitor and measure, and act decisively when data nudges you to your next move. To get on the right track, tackle these 10 key questions about the metrics and methods important to your unique cause. Your answers might surprise you.

1

Are we evaluating only "table-stakes" data?
Basic data will always be useful, but fundraising is a dynamic field. Your work evolves. Your priorities mature. To avoid stagnation, regularly re-evaluate your vision of success—and identify the mission-specific data that will get you there.

2

Have we forgotten to speak in plain language?
It is easier to identify success when you communicate about data and analytics using simplest terms. Relate data and metrics to your gift officers' day-to-day work by converting percentages, amounts, and numbers into short, plain-language sentences.

3

Are we measuring and monitoring the right data?
In healthcare, our fundraisers might keep an eye on new patient donors, lapsed donors, proposals, and portfolio coverage. Your list will be unique, but it should be focused on achieving organizational goals and goals for individuals—and both should be tied to your mission.

4

Do we ignore unfavorable data?
It's exciting when data gives you good news. But results are not always what you expect. "Unfavorable" data doesn't necessarily signal failure, but rather protection from low-value investments. Whether results are spot-on or a surprise, data will point you to the future.

5 Are we overcomplicating it?

There's no need to boil the ocean. We've found it effective to monitor and measure a manageable set of high-value indicators of success, a blend of organizational-level goals and individual-level goals. Don't track everything; just the right things for how you define success.

6 When data speaks, are we listening?

Sometimes, a data trend practically screams at you. Best advice? Listen. Following your data's unsolicited advice just might take your mission to the next level.

7 Could automation improve our fundraising?

It can be a challenge for fundraisers to find the time to turn a massive spreadsheet with lots of data into an action plan. Try creating a custom automation to prompt action, such as a Monday morning email that generates each fundraiser's top to-do tasks based on the data.

8 Do we use data in a positive way?

Data used for coaching is powerful. Using it to punish your team is a misuse of business intelligence. Yes, reference your data to have hard conversations. But don't use it as a weapon.

9 Is our team taking a collaborative approach to data?

Data matters to everyone on your team, but without making a dedicated effort, your CFO, volunteer coordinator, and gift officers might not know what the other shop knows. Help everyone in your organization understand how data and trends are impacting your mission.

10 Are we asking "why" often enough?

Asking "why" early and often signals that you're approaching your mission with genuine curiosity. Well-reasoned. robust answers to "why" often lead to more meaningful action.

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