Welcome and Introduction

Emily Marcason-Tolmie, M.A., M.F.A

Emily has worked in prospect development for nearly 15 years. She's an expert in prospect management, proactive and reactive research, analytical procedures, and trend forecasting, while focused on successfully building robust prospect pipelines, predictive donor modeling, and key fundraising metrics. Emily regularly gives presentations about prospect research for APRA and AFP chapters around the country, as well as for the DonorSearch Philanthropy Mastermind series. Dedicated to the field of prospect research and management, Emily served on the APRA-NY board for several years, including most recently as the chapter's elected president during the pandemic. She is a graduate of St. Michael's College in Colchester, Vermont, while also holding two master's degrees from Southern New Hampshire University.

Joe Stabb, Ph.D., APR

Joe Stabb, Ph.D., APR, is an Assistant Professor of Practice at the Tombras School of Advertising and Public Relations in The University of Tennessee, Knoxville. He has worked with clients/companies in a variety of industries to utilize their traditional and digital resources to meet and exceed their revenue goals. He has experience in marketing communications, public relations, fundraising, business management, and leadership development. Joe is a graduate from Utica College with a Bachelor's degree in Public Relations, a Master's of Science degree from Keuka College in Management, and has a Doctoral degree in Leadership and Policy from Niagara University. Stabb also holds an advanced certificate in international trade and commerce (TE) from the World Trade Center Association, accreditation in public relations (APR) from the Universal Accreditation Board (UAB) and the Public Relations Society of America (PRSA), and an advanced certificate in effective college teaching (ACUE) from the Association of College and University Educators. Joe also believes in giving back to the community. In his free time, Joe Stabb stays active with family and friends, enjoys camping and traveling, attending the theater or opera, and cooking at home or eating at local diners.

Data Analytics

The science that analyze crude data to extract useful knowledge (patterns) from them. This process can also include data collection, organization, pre-processing, transformation, modeling and interpretation.

CAPTURE
Data ingestion
at any scale

→

PROCESS
Reliable streaming
data pipeline

→

STORE
Data lake and
data warehousing

→

ANALYZE
Data warehousing

→

USE
Advanced analytics

Donations

Donor Deep-dive

Current Month	Current Year	Donation Source	Donor Country
Dec	2021	All	All

Current Period vs Reference Period	*defines color coding*	Donation Type	Donor Type
Year-to-Date: Current Year vs Previous Year		All	All

YTD Dec-21 compared to YTD Dec-20   Show   Donor 9

Donor 9
Privately Hold Companies

Donor for **5 year(s)**

Acquired in **February 2017**
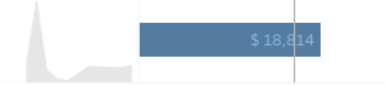Most recent gift in **November 2021**

Lifetime Total Donations **$ 65.6K**

2017   2018   2019   2020   2021

$ 19K
$ 16K
$ 14K
$ 9K
$ 8K

Lifetime Total Donations
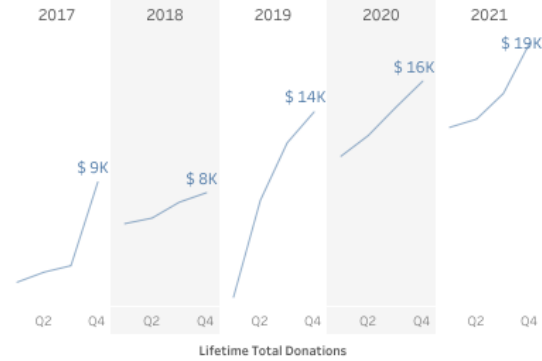
What are the past donations from Donor 9?

▲ $ 18,814
Total Donations
+17.4% vs YTD Dec-20

$ 12,738 $ 15,153 $ 18,814   YTD 2020

▼ 10
Gifts
-37.5% vs YTD Dec-20

1 2 3 4 5 5 7 7 7 9 10 10   YTD 2020

▲ $ 1,881
Avg Gift Amount
+87.9% vs YTD Dec-20

$ 5,665 $ 2,665 $ 2,165 $ 1,881   YTD 2020

Donor Profile (based on donor lifetime)

Last Gift		● High Recency
Gift Frequency	● Very Low Frequency	
Total Donations	● Low Total Donations	

Donor Segmentation

Donor 9 is part of "Need Attention" segment

Above average recency, frequency and monetary values. May not have donated very recently though.

Recommended action ⓘ

Recommend based on past donations. Reactivate them.

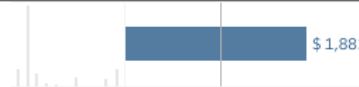| Top Donation Types	DONATIONS	GIFTS
Cash	$ 18,814	10 gifts ▏ $ 1,881
	Total Donations Last 12 months Current Period	Gifts Last 12 months Current Period ▏ Avg Gift Amount Last 12 months Current Period
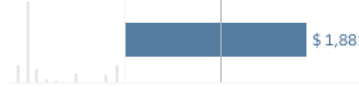
Top Donation Sources	DONATIONS	GIFTS
Spontaneous Donations	$ 18,814	10 gifts ▏ $ 1,881
	Total Donations Last 12 months Current Period	Gifts Last 12 months Current Period ▏ Avg Gift Amount Last 12 months Current Period

Top Appeals	DONATIONS	GIFTS
Appeal 1	$ 18,814	10 gifts ▏ $ 1,881
	Total Donations Last 12 months Current Period	Gifts Last 12 months Current Period ▏ Avg Gift Amount Last 12 months Current Period

https://exchange.tableau.com/products/600

Data Visualization

The representation of information in the form of a chart, diagram, picture, etc. The making of complex concepts easier for stakeholders to understand.
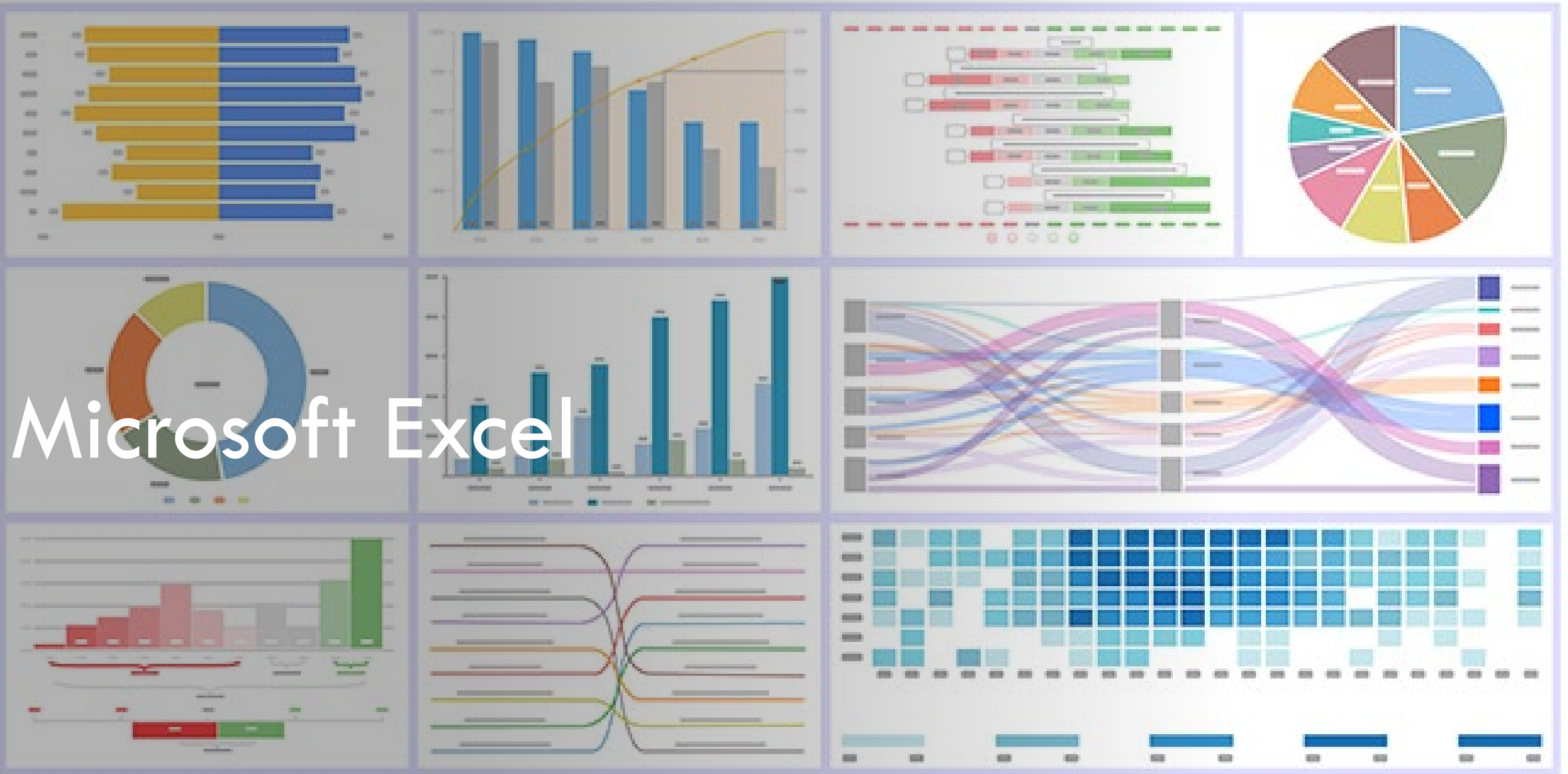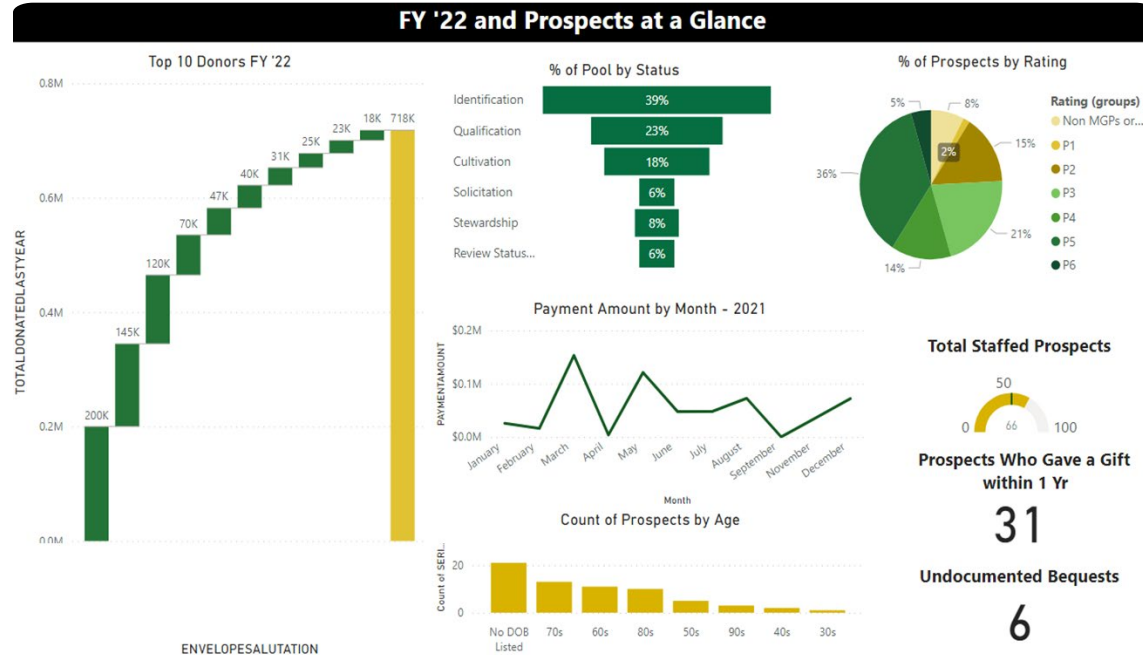
Microsoft Excel

Top 10 Cool Excel Charts and Graphs to Visualize Your Data

FY '22 and Prospects at a Glance

Data Storytelling

- Bring data to life, making you the master storyteller of the insights hidden within your reports

- Explore: Find patterns and insights

- Monitor: Check performance (i.e. prospect review dashboard – see left) for lead indicators and key performance metrics

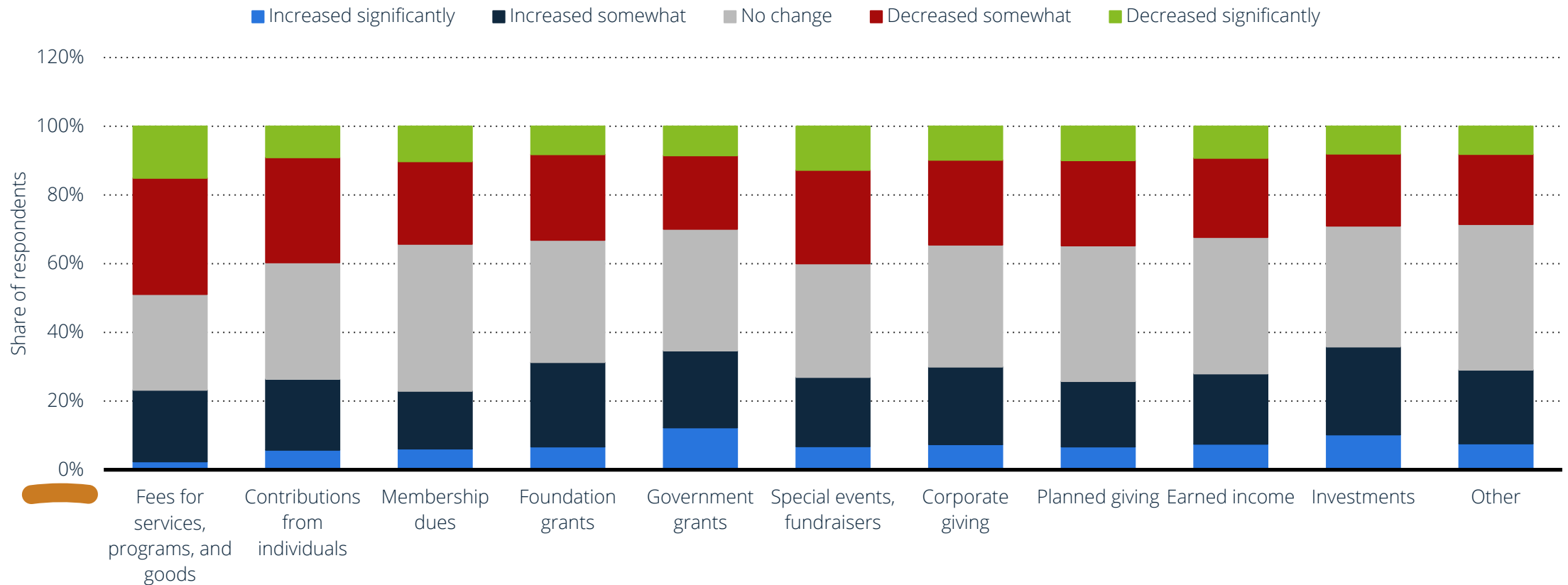- Explain: Go beyond the "what" and dig further into the "why." Helps broad audiences understand complex data
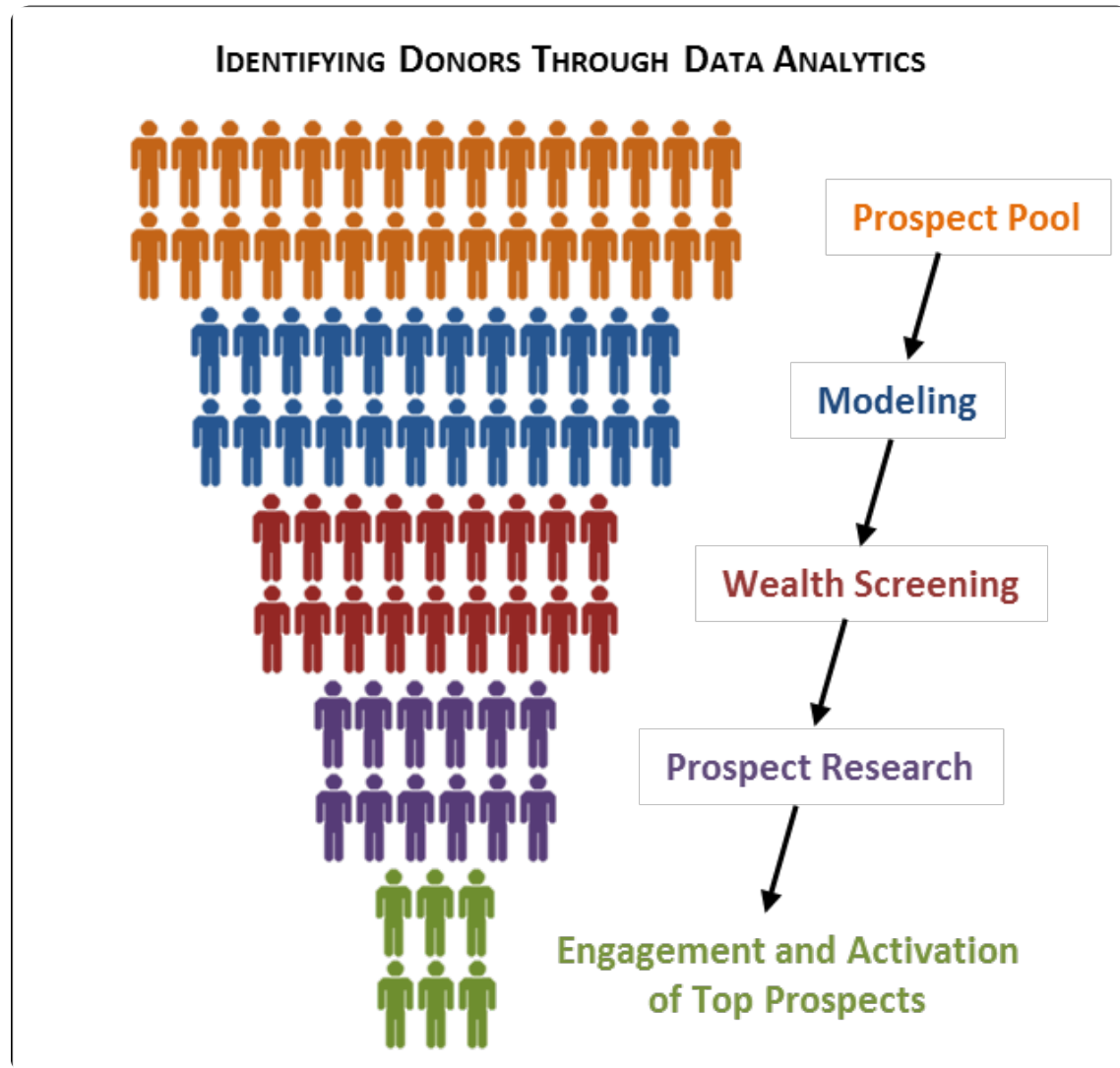
Trends and the Future

YouPhilanthropy

Percentage of nonprofit organizations reporting either an increase or decrease in charitable receipts between 2021 and 2021, by revenue source

Data-Driven Philanthropy

- Based on FACT and not "gut feeling"
- Successful campaigns begin with research – collecting and maintaining good data is key
- Concrete procedures to assess metrics
- Track success and failures to inform future strategy

Artificial Intelligence

How can I use AI to gain donations for my nonprofit organization?

There are several ways you can use AI to gain donations for your nonprofit organization:

1. Personalization: Use AI to personalize donation requests based on the interests and giving history of individual donors. AI algorithms can analyze large datasets to identify patterns in donor behavior and preferences, allowing you to tailor your messaging to specific groups of donors.

2. Predictive Analytics: Use AI to predict which donors are most likely to give and how much they are likely to donate. This can help you focus your resources on the most promising fundraising opportunities and tailor your outreach to maximize the chances of success.

3. Chatbots: Use AI-powered chatbots to engage with potential donors on your website or social media pages. Chatbots can provide information about your organization, answer questions, and even collect donations directly through the chat interface.

4. Social Media Analysis: Use AI to analyze social media conversations and identify potential donors who are talking about causes related to your organization. You can then reach out to these individuals with targeted messages and donation requests.

5. Donor Retention: Use AI to analyze donor data and identify patterns in donor behavior that could indicate a high risk of donor churn. This can help you proactively address donor concerns and keep them engaged with your organization.

It's important to note that while AI can be a powerful tool for nonprofit fundraising, it's not a magic solution. You'll still need to put in the time and effort to build relationships with donors, tell compelling stories about your organization's impact, and make it easy for donors to give. However, AI can help you do these things more effectively and efficiently, allowing you to raise more funds for your important work.

# Case Examples

PowerBI and Tableau

Case #1 - PowerBI

Background: Asked by VP of Advancement for prospect regional analysis to determine projected presidential travel for a fundraising initiative and determine the need for a proposed Midwest region gift officer

Show Me The Money

- Locations of targeted fundraising prospects include the ability to drill down to display potential asks amounts and lifetime giving to the College

- Relied also on giving capacity - capacity refers to a prospect's financial ability to make a major gift– something that can be ascertained using descriptive fundraising analytics (describing what we already know)

- Bubble size is indicative of count of prospect only (if larger bubble, more than one prospect has the same zip code)
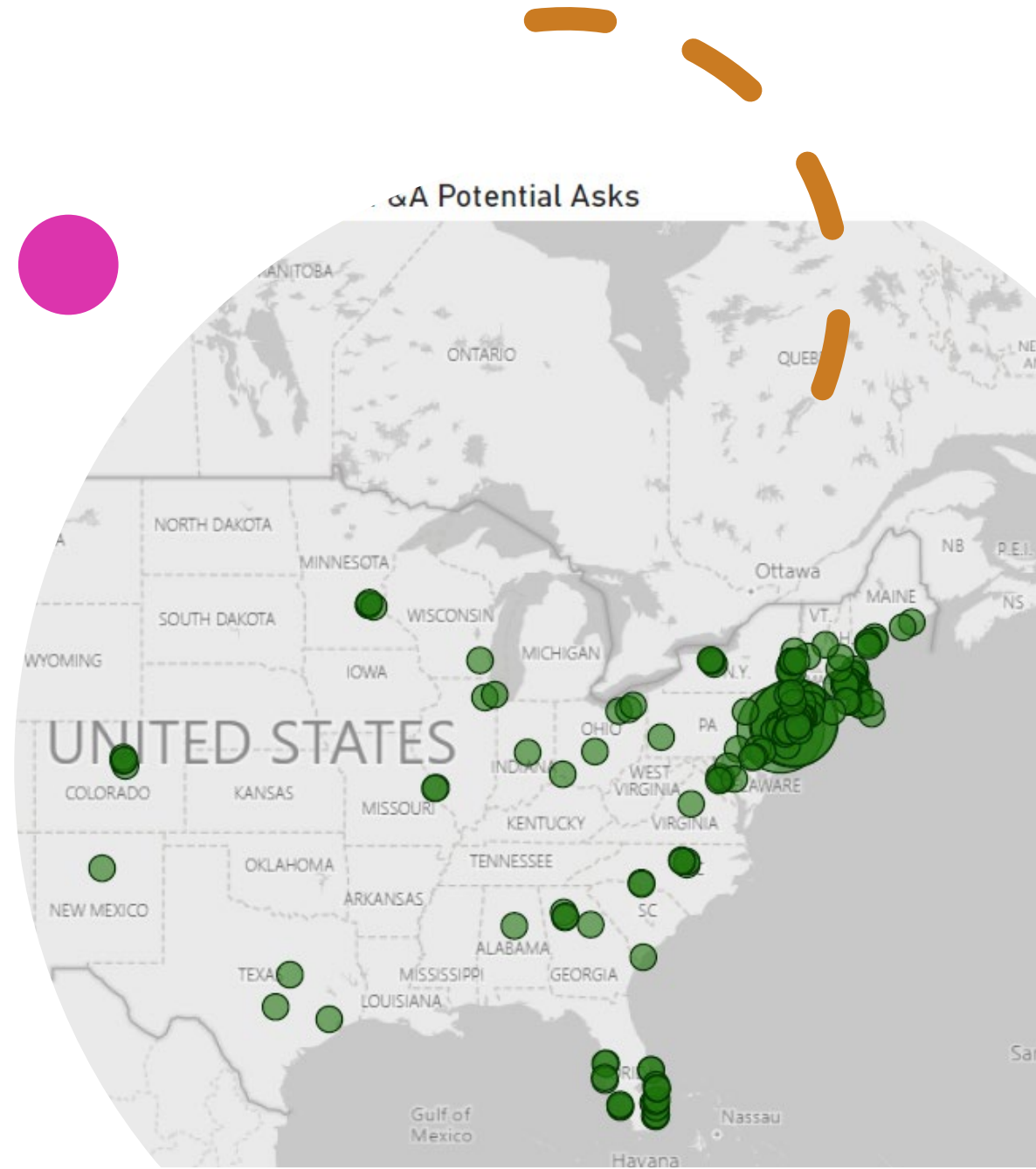
Show Don't Tell

- Regional Analysis – Regional breakdown by all staffed, unstaffed, and recent giving - sum of last 6 year giving by all constituents regardless of staffing

- Using this data package, we were able to determine the newly hired gift officer would shift focus from the Midwest to the Southeast (Florida) and the Pacific Coast

All Staffed Prospects
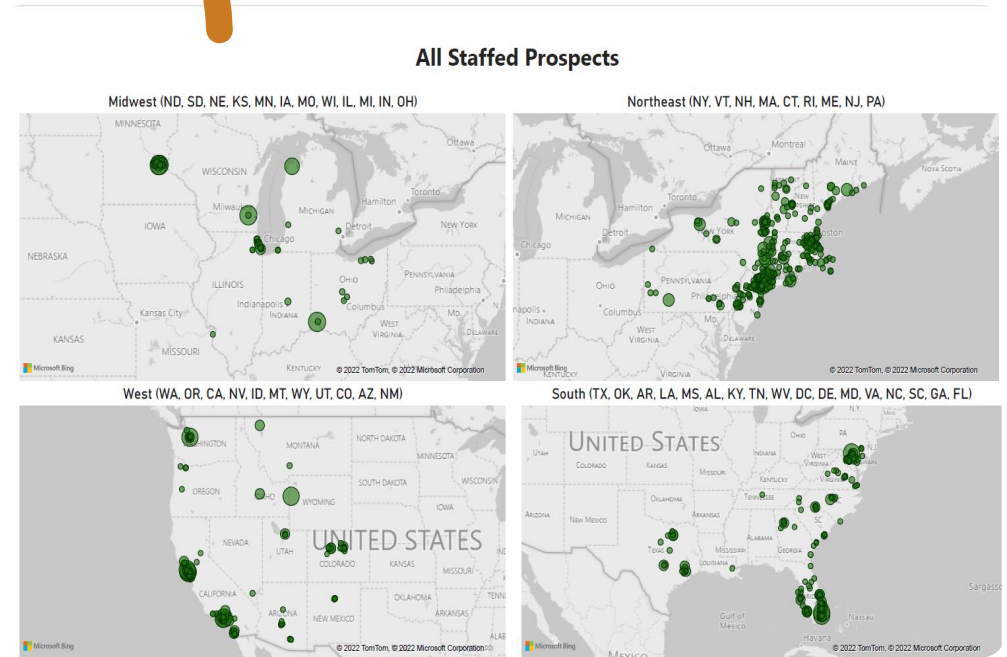
Case #2 - Tableau

Dashboards utilizing live data are visual and interactive. Dashboards implemented properly and ethically can lead to better and quicker business decisions.
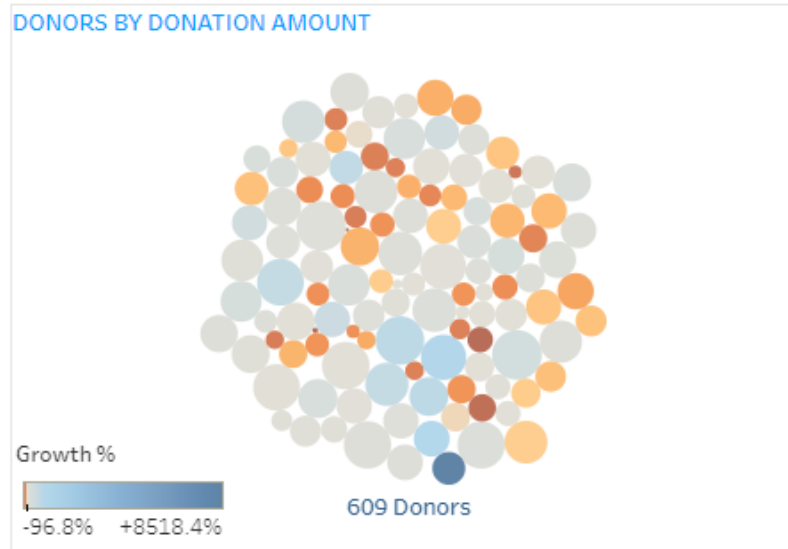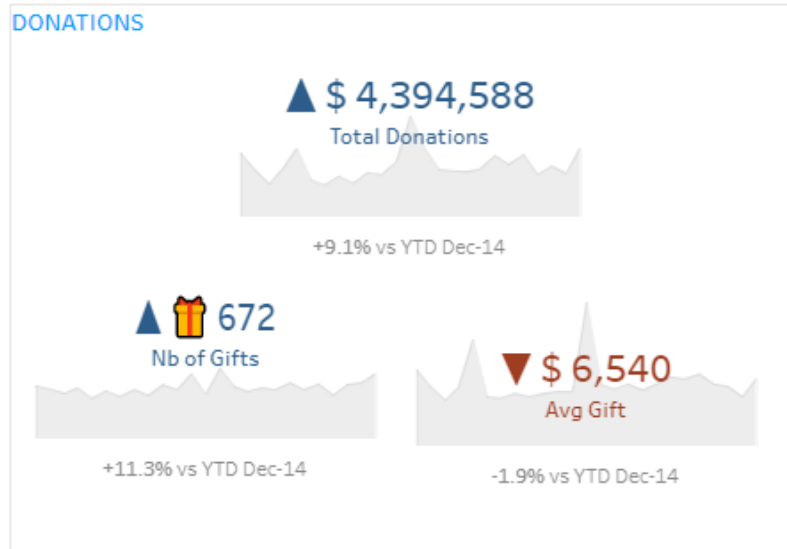
NonProfit Fundraising by robin sturgis

NonProfit Foundation
Fundraising Cockpit

YTD Dec-15 vs YTD Dec-14

DONATIONS

▲ $ 4,394,588
Total Donations

+9.1% vs YTD Dec-14

▲ 🎁 672
Nb of Gifts

+11.3% vs YTD Dec-14

▼ $ 6,540
Avg Gift

-1.9% vs YTD Dec-14

DONORS BY DONATION AMOUNT

Growth %

-96.8%   +8518.4%

609 Donors

APPEALS

▲ 119
Nb of Appeals

+2.6% vs YTD Dec-14

▲ $ 36,929
Donations per Appeal

+6.4% vs YTD Dec-14
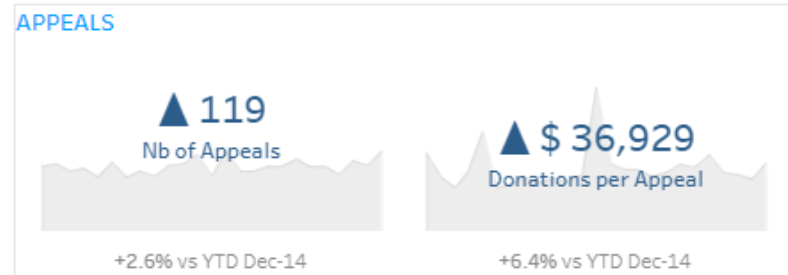
Appeal	Amount
University Annual Fund	$ 508,361 (12%)
Trustees Fund	$ 461,872 (11%)
Diversity Fund	$ 437,908 (10%)
College of Arts and Sciences	$ 397,799 (9%)
Faculty Chair Endowments	$ 382,085 (9%)
College of Natural Science	$ 327,679 (7%)
College of Agriculture and Natural Resources	$ 268,226 (6%)
College of Social Science	$ 235,841 (5%)
In-State Scholarship Fund	$ 162,477 (4%)
Alumni Association	$ 161,777 (4%)
University Libraries	$ 159,963 (4%)
Parents Association	$ 145,547 (3%)
Athletics	$ 135,005 (3%)
Campus Museums	$ 125,388 (3%)
Campus Recreation	$ 118,335 (3%)
Minority Scholarship Fund	$ 105,832 (2%)
Honors Program	$ 91,645 (2%)
College of Education	$ 89,035 (2%)
College of Communication Arts and Sciences	$ 79,768 (2%)

RESULTS PER DONOR TYPE

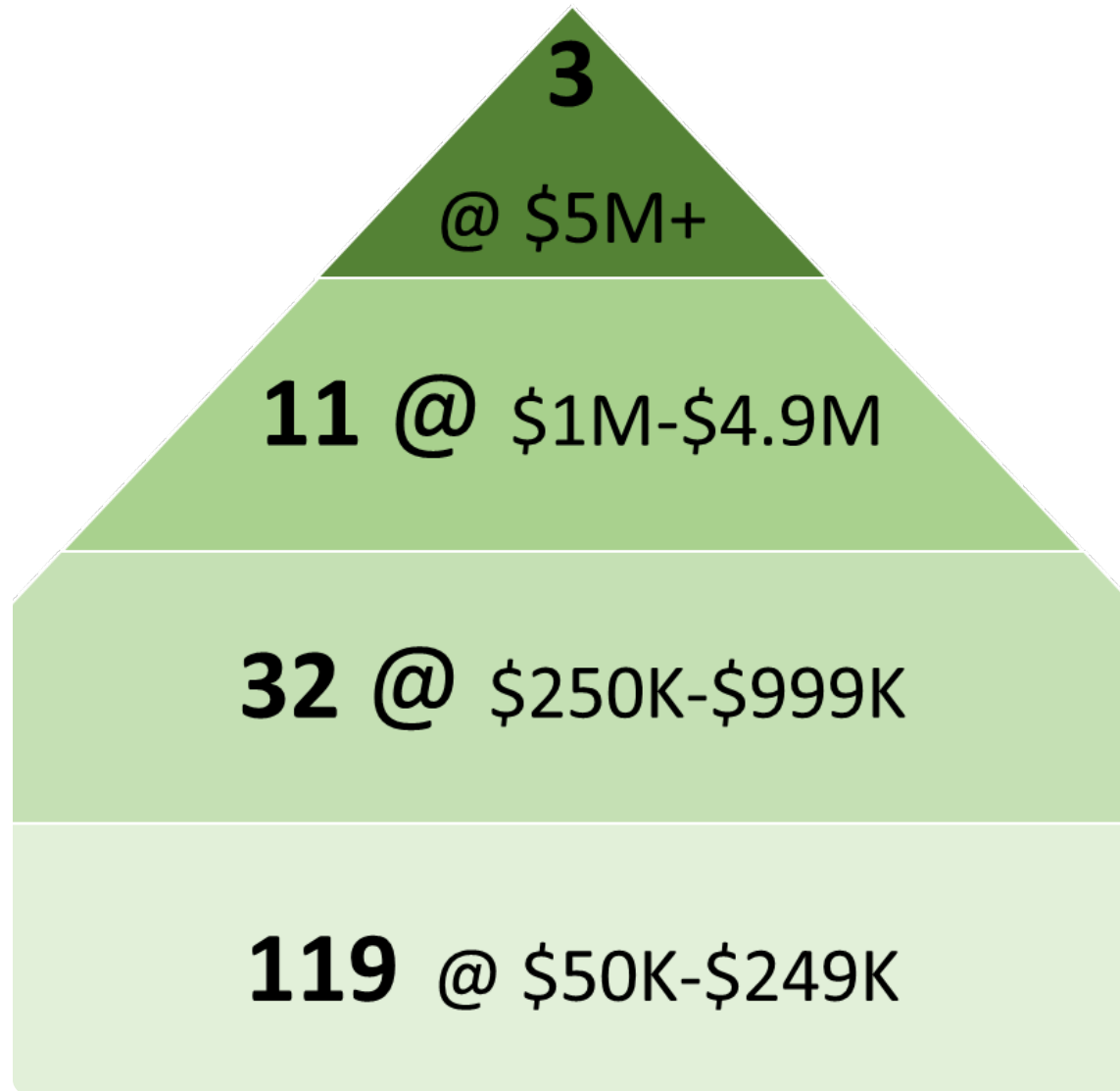|	DONATIONS	GIFTS		DONORS	
	Total Donations	Nb of Gifts	Avg Gift	Nb of Donors	Nb of New Donors
Corporation	$ 690,736	🎁 107	$ 6,455	96	69
Foundation	$ 1,275,344	🎁 200	$ 6,377	180	128
Individual	$ 2,428,508	🎁 365	$ 6,653	333	248
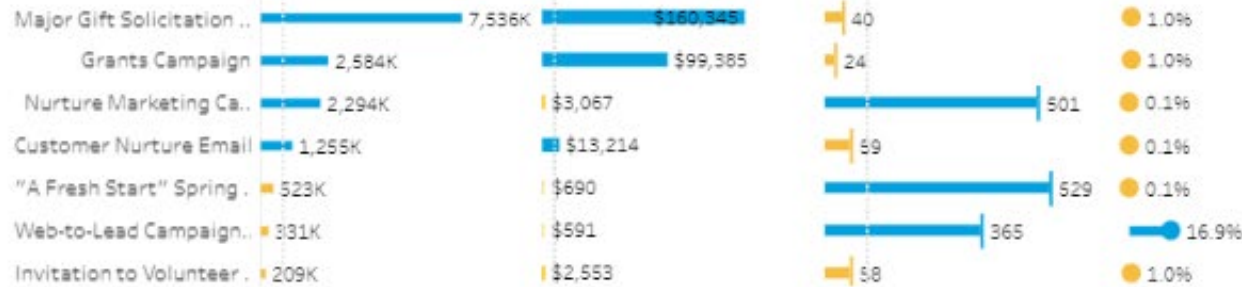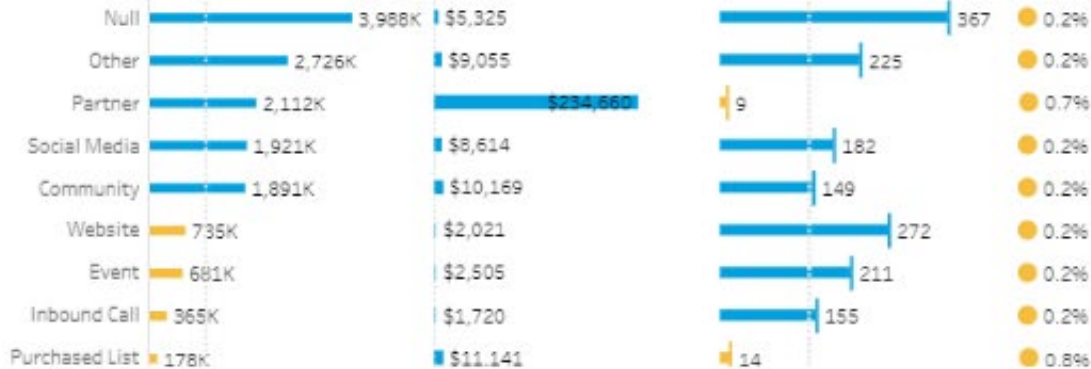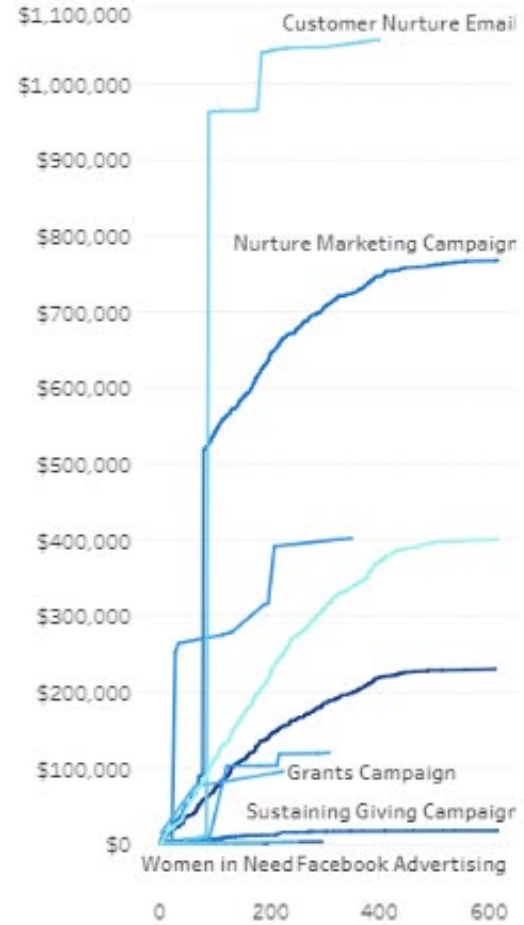
Case #3 - PowerBI

Background: Asked by VP of Advancement to identify for the BOT a prospect pipeline/pyramid for an athletics fundraising initiative

Money Ball

- Charged by BOT to raise money for the renovation and construction of a health, wellness, and athletics center on campus

- Used specific data points for predictive modeling of donors to target for initiative

- Using PowerBI to construct and build out this model has allowed us to continuously share and update with stakeholders a targeted pipeline and donor pyramid to reflect real time potential donors

Tips and Training

How to Get Started with PowerBI

- [Download](#) Power BI Desktop free on Microsoft Linkedin Learnings
- [Power BI: Dashboards for Beginners](#)
- Udemy
- [Microsoft Power BI Desktop for BI](#)
- Microsoft Tutorials
- [Dashboard in a Day](#)
- [Power BI Community](#)
- Connect with Fundraising and Research Shops

How to Get Started with Tableau

- [Download](#) Tableau
  - Academic license free for [Teacher/Student](#)
  - [Donated licenses for small nonprofits](#) (via Techsoup.com)
- [Free Training Videos](#) – Tableau.com
- LinkedIn Learning
- Coursera.org
- Local or Academic Library
- Local College/University Courses (Data Analytics/Visualization)

Question?

Connect with us

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