



**STORY POINT**  
CONSULTING

# Fundraising Basics for Small Nonprofits

Using Data to Create an Effective Fundraising Strategy

## How We Help!

As Canadian fundraising consultants with over 20 years of experience, we help the people working or volunteering at charities and nonprofits **find** the right donors, effectively **communicate** with supporters, and **strengthen relationships** with them.





Canadian Indigenous Flag, designed by Curtis Wilson of the Wei Wai Kum First Nation

# Data Gaps in Small Teams



Understanding what's missing.

# How Data Can Help Your Team



Questions that data answers.

# Problems You Can Solve



Interpreting data to make better decisions.

# Analyzing Your Data



Using a step-by-step process.

## Barriers to Using Donor Data



**Not Part of Daily Work**



**Multiple Sources of Data**



**Poor Data Quality**



**Hard-to-Use Tools**



## **Why Your Data Matters**

Strong data supports your fundraising strategy.

## Getting Your Data Ready to Use





## **Make Your Data Work: Cleaning Your Data**



## **Reviewing Your Data Together**

Making your data work better for everyone



## **Help Your Team Use Data**

Training that supports staff and volunteers



## **Solving Fundraising Challenges with Data**



## **Maplewood Community Centre**

Finding opportunity in the data you already have.

## Reconnecting with Lapsed Donors

**What Was Happening:** Maplewood was spending most of their time looking for new donors.

**What They Noticed:** A group of past donors had not given in a while.

**What They Did:** Sent personalized messages highlighting each donor's last gift and its impact.



Donor ID	Donor Name	Gift Amount	Donation Date	Campaign	Lapsed
1	Milford Lopez	\$75.00	2023-04-05	Spring Appeal	Yes
1	Milford Lopez	\$75.00	2022-11-01	Year-End	Yes
1	Milford Lopez	\$100.00	2021-12-03	Year-End	Yes
2	Kitty Schmidt	\$50.00	2023-12-23	Year-End	No
3	Maricela Andrews	\$25.00	2023-09-26	General Fund	No
4	Frederick Walton	\$50.00	2023-10-26	Year-End	No
5	Aaron Case	\$25.00	2024-04-01	Spring Appeal	No
6	Ellsworth Madden	\$25.00	2023-05-15	Spring Appeal	Yes
7	Jospeh Keith	\$50.00	2023-10-02	General Fund	No
8	Jamal Patrick	\$75.00	2023-05-21	General Fund	Yes
9	Tricia Peterson	\$200.00	2023-09-29	General Fund	No
10	Carla Noble	\$25.00	2023-11-19	General Fund	No
11	Alvin Conrad	\$80.00	2024-11-01	General Fund	No
11	Alvin Conrad	\$80.00	2023-08-31	General Fund	No
12	King Cortez	\$25.00	2023-12-22	Year-End	No
13	Steven Vaughn	\$30.00	2023-09-04	General Fund	Yes
14	Angelina Juarez	\$75.00	2024-04-04	Spring Appeal	No
15	Danial Sosa	\$40.00	2023-10-15	General Fund	No
16	Ivory Kerr	\$75.00	2023-10-25	Year-End	No
17	Hayden Gross	\$75.00	2023-12-03	Year-End	No
18	Nicholas Rivas	\$50.00	2023-10-20	General Fund	No
19	Colette Villarreal	\$125.00	2023-10-18	General Fund	No
20	Teresa Lyons	\$75.00	2023-05-13	General Fund	Yes

## Spotting Lapsed Donors in Your Data



## Finding Your Most Generous Supporters

**What Was Happening:** Maplewood did not have a quick way to identify their most generous supporters.

**What They Noticed:** After summarizing their data, they could see total giving per person.

**What They Did:** They highlighted their top supporters and invited them for a tour of the centre.

Lapsed	No
<b>Row Labels</b>	<b>Total Gift Amount</b>
David Ambrose	\$750.00
Silas Walker	\$550.00
Tricia Peterson	\$200.00
Alvin Conrad	\$160.00
Colette Villarreal	\$125.00
Carly Arroyo	\$100.00
Angelina Juarez	\$75.00
Olga Proctor	\$75.00
Michal Duffy	\$75.00
Ivory Kerr	\$75.00
Wilma Chandler	\$75.00
Hayden Gross	\$75.00
Lesa Robbins	\$75.00

## Spotting Top Donors in Your Data

## Getting to Know Your Supporters Better

**What Was Happening:** Maplewood could not easily see each donor's full giving history.

**What They Noticed:** Summarizing data by donor gave them a clear view of individual giving.

**What They Did:** They filtered by donor name to see each person's giving history and prepare for more personal conversations.

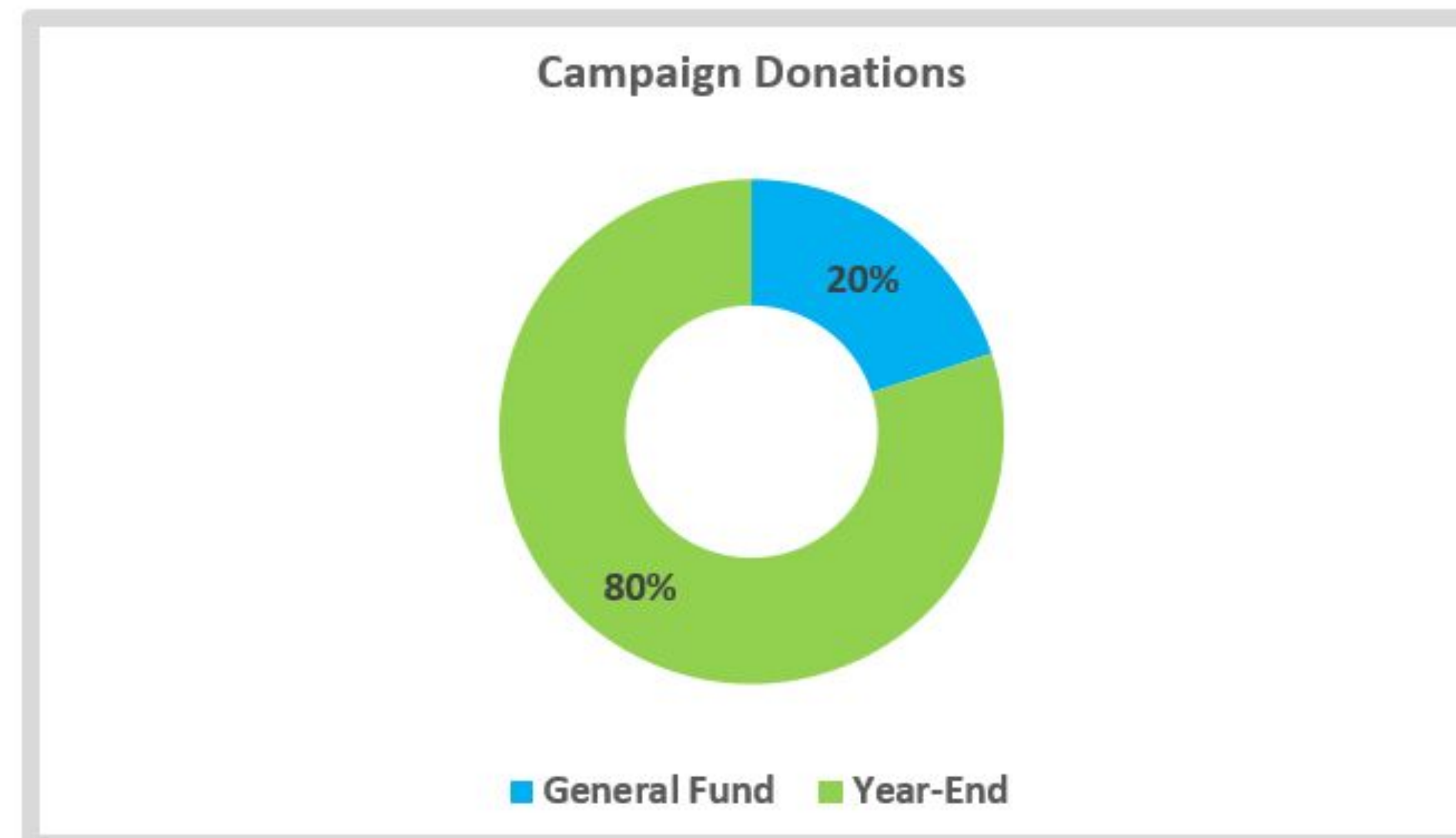
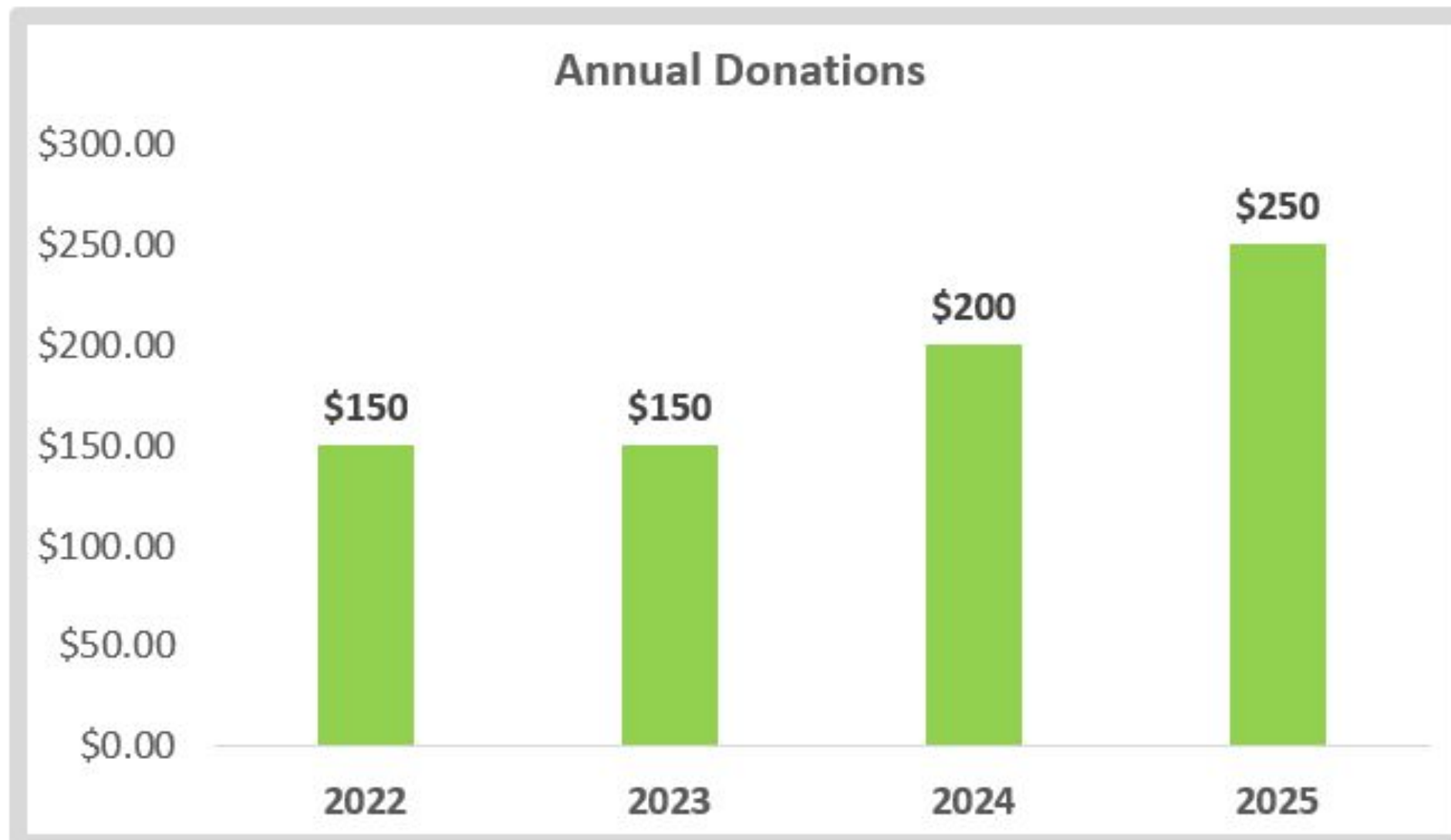


Donor Name David Ambrose

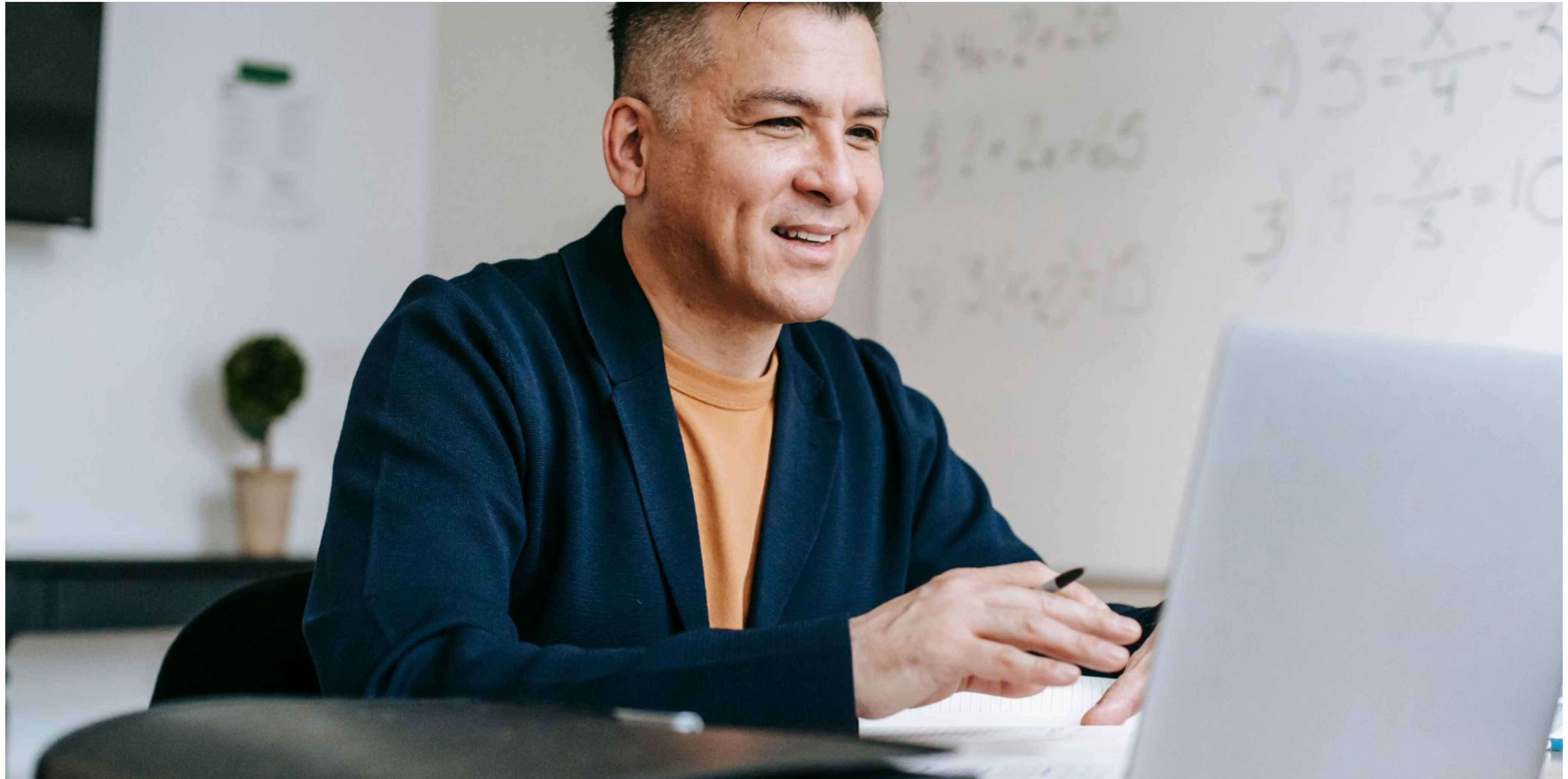
Row Labels	Total Gift Amount	Number of Gifts	Average Gift
<b>General Fund</b>			
2022	\$150.00	1	\$150.00
<b>Year-End</b>			
2023	\$150.00	1	\$150.00
2024	\$200.00	1	\$200.00
2025	\$250.00	1	\$250.00
<b>Grand Total</b>	<b>\$750.00</b>	<b>4</b>	<b>\$187.50</b>

Notes:

David appears to be one of our stronger supporters, given annually since 2022. Is retired and has expressed interest in volunteer opportunities.



## Spotting Donor Trends in Your Data



## **Making Sense of Your Donor Data**

Steps to help turn data into decisions



## **Finding Clues in Your Data**

Look for patterns and opportunities.

## **Use What You Have Found to Take the Next Step**

One small step can move your strategy forward.





**Turn Information Into Action**  
Apply what you know to move forward.

## **Make It Part of Your Routine**

Create procedures to make it standard practice.



Gift Band	Number of Donors	Total Giving	Notes
\$0 - \$249	53	\$4,175	Most of our donors fall in this category will continue to keep them engaged with updates.
\$250 - \$499	5	\$1,250	Small group, will watch for patterns and look for ways to start building relationships.
\$500 - \$749	3	\$1,500	This group shows promise and if time allows, consider personal outreach.
\$750+	3	\$4,500	Strong support from these three donors, this is a good opportunity for personal outreach.

## Examine Giving Levels to Guide Outreach



## **Refining Your Strategy**



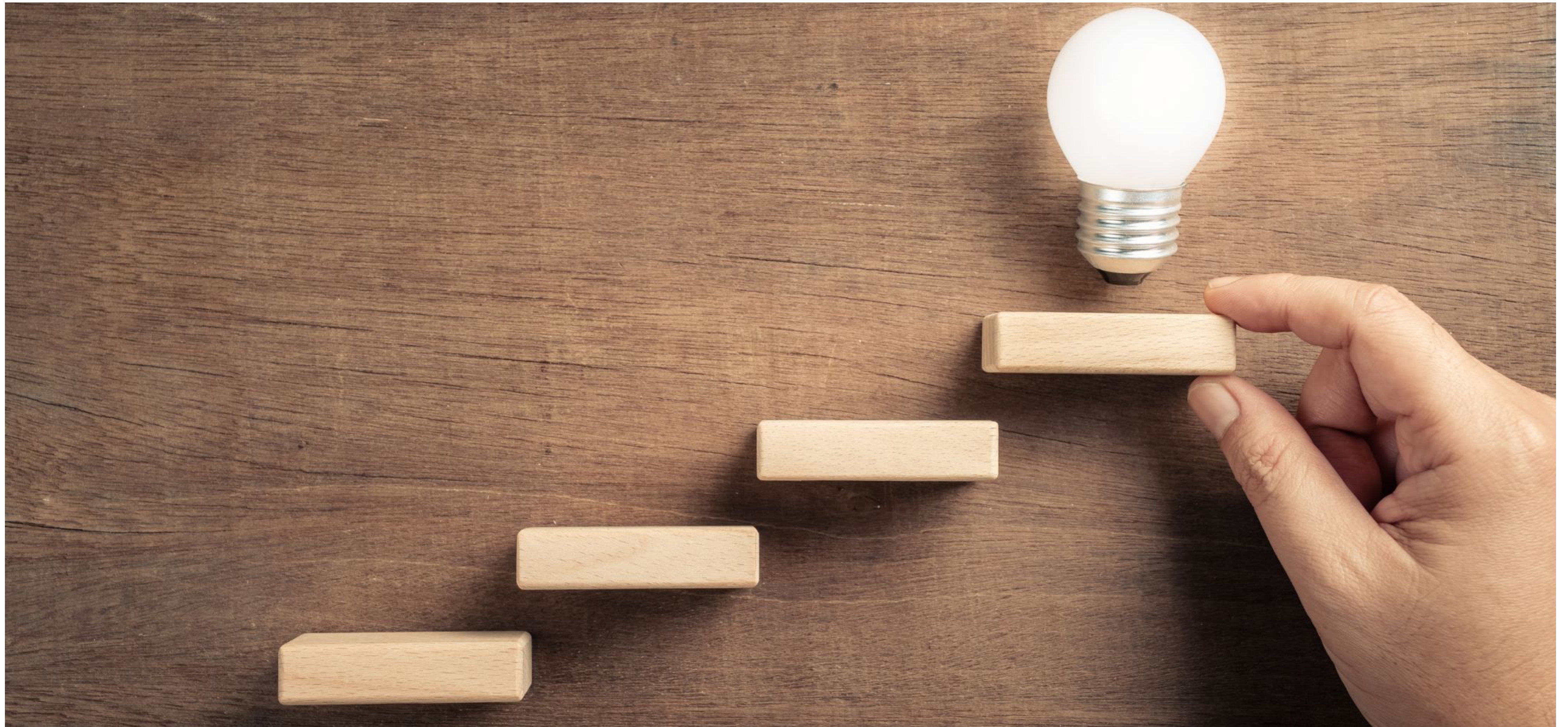
## Using Artificial Intelligence



**AI Can Help, But You Know Your Donors Best**



## Making Your Data Work for You



**Focus On What Matters Most**



**Keep Your Data Clean**



## Look For Patterns



## Connect the Dots



## Use Data to Deepen Relationships



eBooks, tools  
and templates

RESOURCES FROM STORY POINT CONSULTING

## Fundraising Templates

Visit our Resource Library at: [storypoint.ca/](https://storypoint.ca/)



# Contact Us



**Email:** [info@storypoint.ca](mailto:info@storypoint.ca)



**Website:** [www.storypoint.ca](http://www.storypoint.ca)



**Subscribe:** [https://mailchi.mp/storypoint/fundraising\\_foundations](https://mailchi.mp/storypoint/fundraising_foundations)