WHITE PAPER

CAMPBELL & COMPANY

ASSESSING AND IMPROVING YOUR DATA LANDSCAPE

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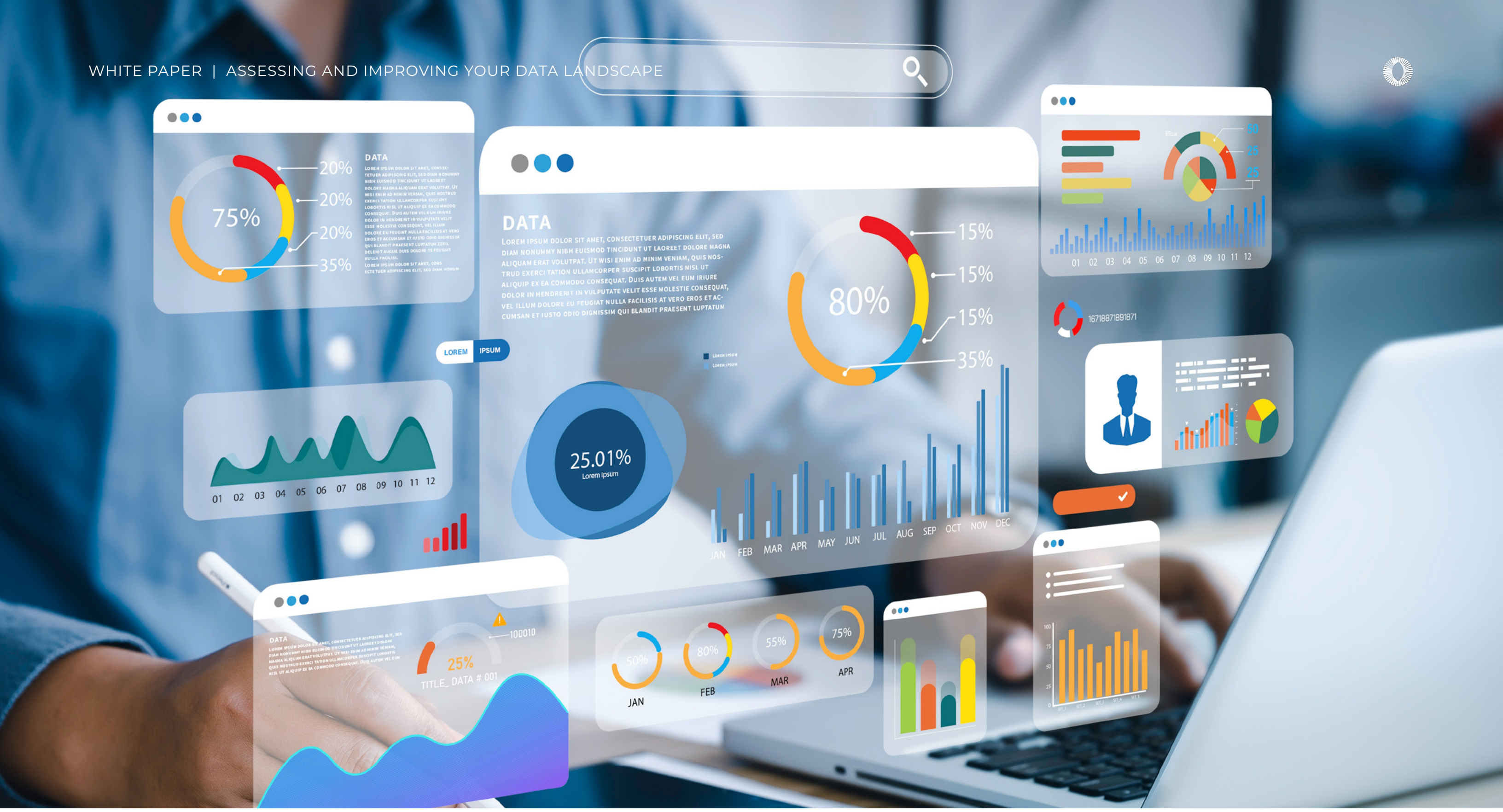


WHAT IS A DATA LANDSCAPE?

Data has become an indispensable resource for organizations in the philanthropic sector looking to maximize their donor engagement, streamline operations, and enhance overall fundraising efforts. An organization's Constituent Relationship Management (CRM) is the heart of that effort—much more than a collection of contact information, it is a strategic asset that can drive informed decision-making, improve efficiency, and support meaningful donor relationships. Much has been written about how to make the most of a CRM, but it's important to remember that the CRM is only a piece of a broader **data landscape** at your organization. Your data landscape includes technology platforms, documented policies and procedures, and behavioral norms around the use of those tools. Campbell & Company has helped hundreds of organizations evaluate various aspects of their data landscape, and in this article, we will focus on the leading practices we've learned along the way as well as share some effective tools.

As we have watched the nonprofit sector evolve, we've seen and supported organizations becoming more reliant on data to navigate their fundraising efforts, which makes examining your data landscape ever more important. Several key trends are shaping how nonprofits use data including:

- **Increased reliance on philanthropy:** Organizations are seeking more diverse and sustainable funding sources, with data playing a central role in identifying and pursuing these opportunities.
- **Pipeline-informed planning:** The success of fundraising programs increasingly depends on well-maintained prospect pipelines. By using data to track and project donor behavior, nonprofits can make more accurate projections and tailor their approaches.
- **New responsibilities for fundraising programs:** As organizations have access to more sophisticated tools, fundraising teams must embrace new responsibilities, including data governance and predictive analytics, to optimize their efforts.

KEY AREAS TO MONITORING YOUR DATA LANDSCAPE

An ideal data landscape fosters an environment for clean, secure, and actionable data. To support that, we recommend assessing seven key areas: **Data Quality**, **Data Privacy and Security**, **Third Party Integrations**, **Data Tracking**, **Moves Management**, **Leveraging Data and Analysis**, and **Reporting**.

Data Quality

Clean data allows for more accurate decision-making and better donor engagement. There are limitless examples of where poor maintenance of donor communication preferences, peer relationships, or bio/contact data can torpedo the hard work to retain a donor or cultivate a major gift. Ensuring records are update and accurate is key to avoiding this common and unfortunate mistake. This requires policies and procedures and diligent commitment from operations and front-line staff on everything from auditing for duplicate records to procedures for updating donor information in the CRM.

Data Privacy and Security

Donor data often includes sensitive information, such as giving history, financial details, and personal identifiers. Ensuring that this data is securely stored, ethically handled, and consistently updated is critical for maintaining trust and protecting the organization's reputation. In today's digital age, where data breaches and cyberattacks are increasingly common, even a small lapse in data protection can result in severe consequences, both in donor relations and in financial penalties.

Staying compliant with data protection regulations is crucial not only for legal reasons but also to build trust with stakeholders and maintain a strong reputation for responsible data management. As the regulatory landscape evolves, organizations must not only adhere to existing laws like General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) but also anticipate new regulations, as more states are introducing or expanding their own privacy laws. States such as Virginia, Colorado, and Connecticut have already passed comprehensive privacy legislation, while others are moving in the same direction. Developing strong data protection policies and implementing best practices for secure data storage and handling are essential steps in ensuring compliance.

Third-Party Integrations

Evaluating third-party integrations offers significant benefits by providing a comprehensive view of how data flows in and out of the organization. These integrations, which often include email marketing tools, online giving, peer-to-peer connectors, payment processors, event management, and a variety of other platforms, are critical for day-to-day operations. Assessing them helps identify potential gaps, inefficiencies, or vulnerabilities in data management, security, and compliance with privacy regulations. It also ensures that the tools are aligned with the organization's overall strategy, enabling better decision-making, more streamlined operations, and improved donor engagement and retention through enhanced data-driven insights.

Data Tracking

Though there will always be an "art" to donor solicitation, and donors will sometimes behave unpredictably, there is great value in implementing systems to track donor characteristics and behaviors as part of your data landscape. Effective tracking mechanisms allow us to identify correlations between donor motivations, interactions, engagement, and giving behavior, enabling informed actions.

While robust data tracking systems are critical, it is equally important to acknowledge that ethical data handling is essential to maintaining the trust of your donors. Donors entrust organizations with their personal data under the assumption that it will be handled with care, respect, and confidentiality. To uphold these values:

- **Ensure transparency:** Organizations should be open with donors about how their data will be used and shared, giving them the opportunity to opt out or set preferences regarding their data.
- **Obtain donor consent:** Regularly revisiting and renewing donor consent ensures that individuals are still comfortable with how their data is being used. This includes explaining to them why their data is needed, what it will be used for, and how long it will be retained.
- **Follow the principle of data minimization:** Collect only the data that is necessary for your purposes. Avoid excessive data collection, which increases the risk in the case of a breach.

Moves Management

Building on the Data Tracking priority above, it is worth specifically mentioning tracking related to Moves Management. The intentional movement through the donor journey – from initial engagement to solicitation and long-term stewardship – is a key way that your organization can maximize fundraising outcomes. Without a strong Moves Management process, your organization increases its risk of asking for the wrong amount or asking at the wrong time. It also makes the jobs of front-line staff much harder and less strategic, which can lead to burnout and staffing churn. To avoid this, your data landscape should include policies and procedures for prospect management, as well as a commitment to prioritizing related practices and staffing investment within the fundraising operation.

Leveraging the Data

Once you've put so much care and effort into tracking the right information, it's critical to leverage that data for insights and analysis. Practices like personalization, segmentation, modeling, and leveraging workflows are crucial for a nonprofit because they directly impact how effectively the organization engages donors, manages resources, and measures impact. Personalization and segmentation allow for more targeted communications, fostering stronger donor relationships and increasing the likelihood of donations. Modeling and automation streamline operations, saving time and improving efficiency, while workflows ensure consistency in processes.

Analysis & Reporting

All of the areas above are aided by detailed reports and analyses that assess the effectiveness of related strategies. For example, audit queries support the regular evaluation of duplicate records and the length of time the organization has held particular pieces of donor data to support Data Quality and Data Privacy and Security; similarly, reports and analysis of the connection between donor behavior and giving outcomes are central to the Data Tracking and Moves Management functions. Analyzing data by program provides insights into which initiatives are most effective, guiding future decision-making and resource allocation. By focusing on these elements, you can optimize performance, enhance donor engagement, and maximize overall impact. Quality analysis and reporting is also the carrot that incentivizes input of data by individuals across the organization; otherwise, it's not a great use of their time. Therefore, organizations should regularly analyze data to understand trends, identify new opportunities, and make data-driven decisions.

USING A MATURITY MODEL TO EVALUATE YOUR DATA LANDSCAPE

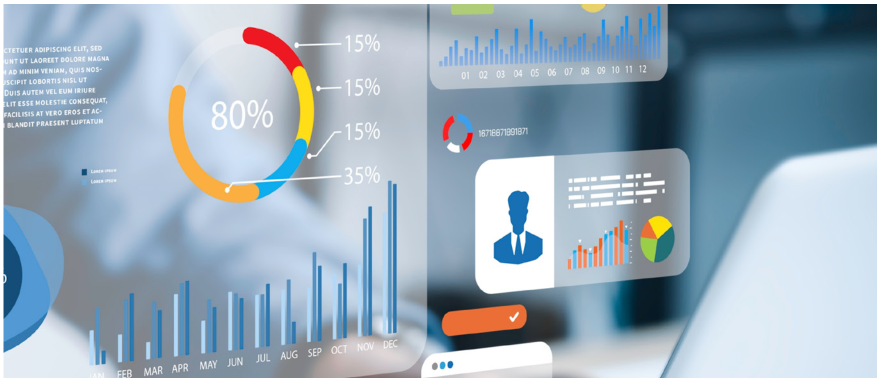
A maturity model offers a clear framework for evaluating and enhancing your data landscape based on a standard scale. Here's how it helps:

- **Comprehensive Assessment:** It helps you assess the state of your donor data management across the key areas previously discussed to provide a clear understanding of your strengths and areas for improvement.
- **Roadmap for Improvement:** The model outlines progressive steps to advance your database practices, from basic data entry to sophisticated analytics and donor engagement strategies. This ensures continuous growth in your fundraising efforts.
- **Better Donor Engagement:** As you move up the maturity levels, you'll be better equipped to segment your donor base and personalize communications, improving engagement, retention, and overall satisfaction.
- **Improved Data Governance & Security:** Higher maturity levels focus on robust data governance and security, ensuring donor information is handled ethically and in compliance with regulations, maintaining donor trust.
- **Targeted Fundraising Strategies:** With a more mature donor database, you can leverage advanced analytics to segment high-potential donors, uncover new donor prospects, and identify patterns that help optimize fundraising campaigns and broaden engagement.
- **Increased Efficiency & Resource Allocation:** A maturity model helps prioritize improvements in your database, allowing you to allocate resources effectively and focus on the areas that will have the greatest impact on fundraising success.
- **Alignment with Organizational Goals:** As your data landscape matures, data becomes more strategically integrated to organizational goals, and enables data-driven decision-making.

By using a maturity model, you can systematically improve how your organization leverages donor data, driving better results and ensuring long-term fundraising success. Here is a starting point for evaluating your own data landscape using a straightforward maturity model from Campbell & Company.

Click to view the Sample Data Landscape Maturity Model.

MOVING TO THE NEXT LEVEL: CREATING A DATA PLAN



Once you've evaluated your current data landscape, it's time to create a data plan that will help your organization move to the next level of data maturity with clear goals and streamlined effort. Key steps include:

Form a Team

Include members from key teams such as fundraising, IT, development/advancement services, and other sector-specific teams (Membership, Alumni Relations, etc.) to ensure that all aspects of the data landscape are considered. It is also important to ensure you have a strong advocate from leadership who can help ensure the process has the support it needs to succeed. The team should schedule regular check-ins to review progress, address challenges, and stay aligned on goals.

Develop a Plan

The completed maturity model is a strong foundation for discussion to identify areas for improvement. In some cases, the team may need to dive deeper to map out data flows or fully evaluate aspects of the database. Once that is complete, the team should collaborate to define short- and long-term goals for your data landscape strategy, focusing on areas that will deliver the most value to the organization.

The implementation strategy should include key people driving toward the goals, metrics and milestones to track your progress and ensure accountability, and a communication plan for roll-out.

Execute the Plan

Get Started! Often, the hardest part is simply beginning. The team should take its first steps, even if the plan isn't perfect. As your organization grows and adapts, revisit and adjust the plan as needed. Data needs and technologies will change, so staying flexible is key. Importantly, staff will need ongoing training to stay up to date on best practices and new tools.

Celebrate Successes

As milestones are reached, take time to recognize and celebrate progress. This encourages continued engagement and creates a sense of accomplishment for the team.

A strong data landscape is vital for any organization looking to thrive in today's competitive philanthropic landscape. By ensuring data is clean, secure, and actionable, nonprofits can enhance donor engagement, improve fundraising efforts, and ensure long-term sustainability.

Establishing a data plan and moving up the levels of data maturity requires thoughtful planning, collaboration, and ongoing commitment. But with a strong plan in place, the journey will not only improve internal processes but also drive meaningful outcomes for your organization and its mission.

Click to view the Sample Data Plan.

SAMPLE DATA LANDSCAPE MATURITY MODEL

This worksheet is designed to guide you through a quick assessment of your donor database usage. By examining different aspects of your database infrastructure and practices, you can identify strengths, uncover areas for improvement, and develop strategies to enhance data management and utilization. Consider it a starting point and be sure to adjust the plan to align with your organizational goals, including additional areas of evaluation, as needed, in the blank rows in each section.

Data Quality	We are not doing this/I'm not sure	We are doing this, but it is very manual	We are using the system, but inconsistently	We are consistently using the system
Eliminate Duplicates				
Update Contact Info/ Regular Enrichment Updates				
Confirm Deceased				
Audit Reports				
Reconciliation with Finance				

Data Privacy/ Security	We are not doing this/ I'm not sure	We are beginning to do this	We are doing this, but not consistently	We are doing this consistently
Compliance with Regulation				
Role-Based Permissions				
Tracking Opt-Outs				
Regular Trainings				
3rd Party Treatment of Data				

Third-Party Integrations	Does not apply/ I don't know	Integration exists, but requires manual effort	Integration is automated, but requires regular updates	Integration runs smoothly
Online Giving				
Email				
Event Management				
Volunteer Management				
Prospect Research/ Wealth Screening				

SAMPLE DATA LANDSCAPE MATURITY MODEL CONTINUED

Data Tracking	We are not tracking/ I'm not sure	We are tracking, but not in CRM	CRM is set up, but we are not tracking consistently	We are consistently tracking in CRM
Volunteers				
Events				
Communications				
In-Kind Gifts				
Planned Gifts				

Moves Management	We are not tracking/ I'm not sure	We are tracking, but not in CRM	CRM is set up, but we are not tracking consistently	We are consistently tracking in CRM
Portfolios				
Prospect Status				
Proposals/Grants				
Activities/Interactions				
(Dis)Qualification				

Leveraging the Data	We are not doing this at all	We do this, but it's time-consuming and inconsistent	We do this in a consistent way, but it's time-consuming	We are streamlined and consistent
Personalization				
Segmentation				
Modeling				
Automation/ Workflows				

Analysis and Reporting	We are not reporting on this at all	We have reports, but they are manual	Reports in system, but not used regularly	Reports in system, and used regularly
Analysis by Program				
Data Integrity/Audit				
Moves Management/ Pipeline				
Contributed $				
In Kind $				
Reconciliation				

SAMPLE DATA PLAN

A data plan ensures clarity, consistency, and accountability. It helps detail how data is collected, analyzed, and utilized, to enhance decision-making, efficiency, and effectiveness. This simple worksheet, a sample data plan developed by Campbell & Company, will help you create and implement an effective data-driven strategy. Consider it a starting point and be sure to adjust the plan to align with your organizational goals, including additional areas of exploration, as needed, in the blank rows in each section.

Objective	Key Steps (Due Dates)	Driver	Partner(s)	Metric/Target
Data Quality Goal: To improve overall data quality to ensure data is reviewed regularly and free of errors				
Eliminate Duplicates				
Update Contact Info/ Regular Enrichment Updates				
Confirm Deceased				
Audit Reports				
Reconciliation w/Finance				
Data Privacy/Security Goal: To ensure the highest standards of data security and privacy, protecting the personal information of stakeholders from unauthorized access and breaches.				
Compliance w/ Regulation				
Role-Based Permissions				
Tracking Opt Outs				
Regular Trainings				
3rd Party Treatment of Data				
Third-Party Integrations Goal: To seamlessly integrate with trusted third-party platforms to enhance our fundraising capabilities and user experience.				
Online Giving				
Email				
Event Management				
Volunteer Management				
Prospect Research/Wealth Screening				

SAMPLE DATA PLAN CONTINUED

Objective	Key Steps (Due Dates)	Driver	Partner(s)	Metric/Target
Data Tracking Goal: To implement comprehensive data tracking to optimize donor engagement and improve fundraising outcomes.				
Volunteers				
Events				
Communications				
In-Kind Gifts				
Planned Gifts				
Moves Management Goal: To enhance practices to guide donors through each stage of their engagement journey, fostering stronger relationships and increased support.				
Portfolios				
Prospect Status				
Proposals/Grants				
Activities/Interactions				
(Dis)Qualification				
Leveraging the Data Goal: To establish practices for using data in a way that enables tailored and meaningful interactions with donors, fostering stronger relationships and increasing engagement and support.				
Acknowledgment				
Personalization				
Segmentation				
Modeling				
Analysis by Program				
Analysis and Reporting Goal: To implement effective reporting practices to track and communicate impact transparently and efficiently.				
Data Integrity/Audit				
Moves Management/Pipeline				
Contributed $				
In Kind $				
Reconciliation				

ABOUT CAMPBELL & COMPANY'S STRATEGIC INFORMATION SERVICES PRACTICE

Our Strategic Information Services (SIS) team uses Analytics, Systems, and Process, to support strategic decision-making within Development and across the organization. Through data-driven insights, we help clients grow their relationships and their fundraising results at all levels of the gift table—and achieve greater mission impact. Our SIS services support your front-line and operations teams to focus on the strategic and results-oriented aspects of their work, leading to more funds to deliver on your mission.

Have any questions? Reach out and let us know!
Visit us at **campbellcompany.com** or email us at **SISteam@campbellcompany.com**.

OUR EXPERTS

ABOUT CARRIE

Carrie Dahlquist brings over 25 years of development and analytics experience to Campbell & Company, and she founded Campbell & Company's Strategic Information Services practice. Pairing effective communications skills with quantitative expertise, Carrie helps organizations understand how data can drive strategic planning and campaign management and provide accountability and transparency. Her experience gives her a unique understanding of how complex information can impact the big picture and inform the decision-making process.

Prior to joining Campbell & Company, Carrie worked at the University of Chicago in a variety of leadership roles in advancement, including strategic planning, campaign management, annual giving, and major gifts. Earlier in her career, she served as the Vice President of Benchmarking and Analysis for an international advancement consulting firm. Carrie began her career at Lincoln Park Zoo, focused on individual giving.

Carrie holds a Master of Business Administration from the University of Chicago's Booth School of Business with concentrations in Econometrics, Strategy and Economics, and a bachelor's degree in Human and Community Development from the University of Illinois at Urbana - Champaign. Carrie serves on the Board of Giving USA Foundation and as the Co-Chair on the Advisory Council on Methodology for the annual Giving USA report, the country's longest-running running report on philanthropy. Carrie is dedicated to making the world a better place, one data point at a time!

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ABOUT MICHAEL

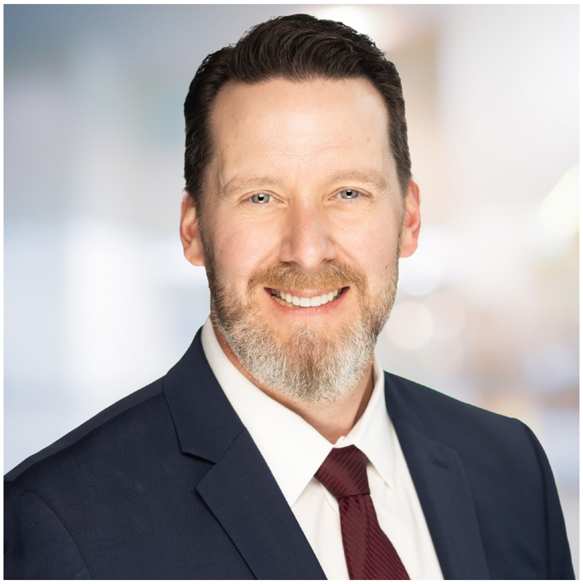
Nonprofit organizations face mountains of data. For an organization to succeed in the long term, donor information, volunteer logs, and relationship records cannot be stored in institutional memory or the personal files of development professionals or executives. Organizations need accessible, transparent data management solutions, and that's where Michael Furlong excels. He enjoys opportunities to:

- Create custom solutions for individual organizations data issues.
- Educate clients on the importance of data cleaning and accurate data entry.
- Work with staff to determine best practices for managing data.
- Help clients, based on certain specification, to assess various software solutions.
- Work with clients to develop custom reports to improve internal efficiencies and communication.

Michael works with clients to build the data management systems they need, maximize the tools they already have, and ensure that the right people can get the right information with just a few clicks.

Michael joined Campbell & Company following a 13-year career in data management with JP Morgan Chase in Chicago. Most recently, Michael served as an Oracle Database administrator in the Asset Management Division of JPM, managing highly transactional systems as well as data warehouse systems. Earlier, he project managed and created custom scripts for data retrieval and updates across multiple servers for more than 80 databases in the Defined Benefits arm of the company. Prior to that, as a Programmer/Analyst, Michael created and managed internal software, worked with clients to clean and organize data, and created custom programs for data access across systems.

Michael holds a B.A. in Marketing from Saint Mary's University of Minnesota, with a minor in Philosophy, and he is Blackbaud certified in Raiser's Edge.



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Campbell & Company is an employee-owned national consulting firm that helps mission-driven organizations create greater impact through fundraising consulting, communications, strategic information services, and executive search. Since 1976, Campbell & Company has helped over 2,500 clients grow their fundraising results through an integrated approach. In addition, our award-winning executive search team brings a record of success in placing exceptional leaders across the nonprofit sector.

Underlying all our work is a shared focus on the Campbell & Company mission: to advance the life-changing work of mission-driven organizations, and our dedication to collaborating with nonprofits invested in inclusive philanthropy to impact lives and move the nonprofit sector toward greater justice.

Visit us at campbellcompany.com and connect with us on LinkedIn, Twitter, Facebook, and Instagram.