A NONPROFIT'S GUIDE TO

Faster, Easier, and More Effective Reporting in 2019

everyaction

INTRODUCTION

Running data-driven programs is a goal that almost every nonprofit team espouses—from the world of long-term relationships with major donors to rapid response online donation collection, any nonprofit professional can explain why collecting and utilizing data in decision making is vital to running an efficient and effective program.

Unfortunately, most fundraising and digital staff of all levels don't feel like they have access to the data they need, in a timely manner and useable format, for informing strategic decisions. In a 2016 study conducted by EveryAction and Nonprofit Hub1, nearly half of nonprofit professionals reported that they do not consistently utilize data as part of their decision-making process. This is not a result of lacking understanding or desire for data on their part, rather it is often the simple reality that pulling large reports can be a complex and difficult process that takes an extraordinarily long time, making getting up-to-date numbers an arduous task. For other data-hungry nonprofit staff, the reports they are able to access are clunky and follow templates which don't accurately reflect the real-life needs of the people using the data, resulting in the need for even more time spent exporting data to an Excel file and reworking it into something useful. Often, nonprofits must hire outside consultants to work reports into a useable format, further precluding staff from regular access to up-to-date data.

To some extent, staff's access to data will always be limited by the capabilities of the organization's data management system and the structure of their department, but following several best practices to maximize the potential of a CRM will save time and stress across the board.

PERFECTING AND MAXIMIZING REPORTING BASICS

While it can be tempting to constantly chase after "the next big thing" in the realm of nonprofit technology, when it comes to reporting, there is no quick and easy fix for all data-related headaches. More detailed and complicated reports (covered later) can be extremely helpful tools for pulling highly segmented lists, but the frequency at which this will affect the daily life of nonprofit fundraisers pales in comparison to the tried and true basic reporting functions.

Regardless of your CRM's tools for advanced reporting, it is almost always most advisable to start by optimizing the way you access the basic data that forms the backbone of your fundraising program. Having access to up-to-date, simple fundraising data (how much money has been raised and where it came from, across various channels and campaigns) is the first step toward revolutionizing your data landscape.

Some of the biggest ways to make sure that you're doing data basics right are below:

1

MINIMIZE EXPORTING DATA FROM YOUR CRM TO EXCEL

It can be tempting to export all of the data from your CRM to an Excel sheet when you want to rework the format of a report. Not only is this hugely time consuming, especially for more complex needs that require downloading spreadsheets for multiple reports and then manually combining them, but it greatly increases the possibility of manual errors and compromised data. As much as possible, work with data using the CRM's reporting tools to save time and ensure accuracy.

2

CUSTOMIZE REPORTS TO DELIVER EXACTLY THE INFORMATION NEEDED

Customizing reports within your CRM ensures that they tell you exactly what you want to know, and only what you want to know. Some report templates may contain more information than you need, or perhaps the information is simply ordered or formatted in a way that is less preferable for your needs. Save your custom reporting templates so that, at any time, they will instantly deliver exactly the information that you need in the format best suited to your department's structure. This ensures that you won't need to spend extra time each week or month reworking your report before it is presentable.

3

SCHEDULE AUTOMATIC REPORT DELIVERY

Whether you are regularly checking data, or reporting out to other team members, scheduling your CRM to automatically pull the reports and send them to a specific audience is an extremely important tool for keeping your everyone in the know when it comes to data. Automated scheduling allows fundraisers and data managers to check one recurring task off of their to-do lists, by automatically pulling and delivering reports on a set schedule. Without any effort on your part, reports can be emailed to any necessary team members at the time and date you choose, freeing up your schedule for more important tasks.

4

GET THE UNIFIED DATA YOU NEED

One of the most basic purposes of reporting, to make sure that you can assess how much money is coming in and where is it coming from across the various channels and campaigns that your organization runs. Using a unified CRM is particularly important in this sense, allowing you to see a full picture of the information you care about, such as seeing both email performance and revenue in one place. Getting all of the information you need from one report, rather than pulling multiple and manually combining them is an important step in saving time during the reporting process.

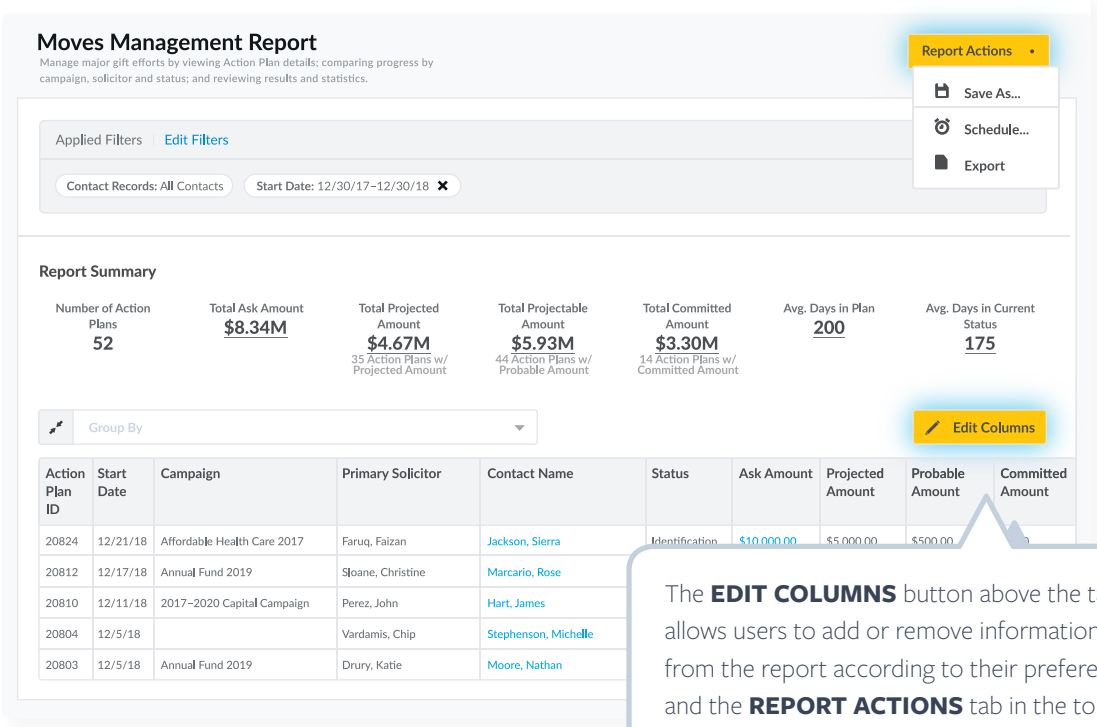
ADVANCED REPORTING

Once you're confident that you're getting all of the basic information that you need to run a dynamite fundraising program, using more complicated reporting templates and dashboards can take your reporting to the next level. These are a few report templates that every fundraiser should consider adding to their toolbox.

1

MOVES MANAGEMENT REPORT

This Moves Management Report template is built to give a complete picture of your entire major donor program, including donors at every stage in the process. Using a template like this allows fundraisers to quickly see a birds-eye view of their efforts.



The **EDIT COLUMNS** button above the table allows users to add or remove information from the report according to their preferences, and the **REPORT ACTIONS** tab in the top right corner offers quick, easily accessed options for saving or scheduling future reports.

Moves Management Report

Manage major gift efforts by viewing Action Plan details; comparing progress by campaign, solicitor and status; and reviewing results and statistics.

Report Actions
- Save As...
- Schedule...
- Export

Applied Filters | Edit Filters

Contact Records: All Contacts | Start Date: 12/18–12/19

Report Summary

Number of Action Plans	Total Ask Amount	Total Projected Amount	Total Projectable Amount	Total Committed Amount	Avg. Days in Plan	Avg. Days in Current Status
41	$3.32M 17 Action Plans w/ Ask Amount	$1.67M 33 Action Plans w/ Projected Amount	$1.92M 17 Action Plans w/ Projectable Amount	$302K 12 Action Plans w/ Committed Amount	160	143

Status | Edit Columns

Status	Total Ask Amount	Total Projected Amount	Total Projectable Amount	Total Committed Amount	Avg. Days in Plan	Avg. Days in Current Status
Qualification	$20,000.00	$15,000.00	$2,000.00	$0.00	296	296
Identification	$280,000.00	$128,000.00	$54,475.00	$1,750.00	150	187
Closed	$500,000.00	$115,000.00	$87,000.00	$11,000.00	250	330
Solicitation	$75,000.00	$45,000.00	$30,000.00	$10,000.00	182	120
Cultivation	$154,000.00	$126,000.00	$39,000.00	$0.00	156	94
Stewardship	$25,000.00	$27,000.00	$35,000.00	$21,000.00	181	99
Negotiation	$2,240,000.00	$1,233,000.00	$1,785,000.00	$248,000.00	168	159

7 Records · 1 Page 1

In EveryAction's Moves Management Report, using tools like the **GROUP BY** option and easily **SORTING COLUMNS** give users the same capabilities of a pivot table in Excel, without any data exports necessary. In the diagram below, grouping by Status and sorting by the total probable contribution amount show fundraisers where their donation pipeline stands. Under **REPORT ACTIONS**, users can easily save the template formatting and schedule automatic delivery of this report.

2

ACQUISITION ROI REPORT

Using the Acquisition ROI Report Template below, Development staff can easily compare results for their acquisition efforts across multiple channels, compare their successes and calculate the return on investment (Cost divided by Amount Raised). Easily tracking return on investment allows a decision makers to easily determine the most effective revenue streams over time.

Acquisition ROI Report

View a summary of how your acquisition efforts are bringing in new contacts, and the associated revenue across several timeframes.

Report Actions

Applied Filters | Edit Filters

Start Date: 12/30/17–12/30/18

Report Summary

Number of New Contacts	Number of Contributions	Total Dollars	Average Contribution Amount	Cost/$ Raised
2	1	$100 $100.00	$100 $100.00	N/A

Edit Columns

Effort Name	Plan Type	Start Date	Number of New Contacts	Number of Donors	Total Contributions in first 12 months	Total Contributions in first 24 months	Total Contributions in first 36 months	Cost/$ Raised	Segment
Sample demo for CS and AMs	Digital Ads	2/26/18							Sample der
Facebook Demo 2-28	Digital Ads	3/1/18							Facebook [
Copy of Recruit sustainers	Digital Ads	7/24/18	2	1	$100.00	$100.00	$100.00		Copy of Re
August 2018 Acquisition Plan (Shefter Demo)	Direct Mail Acquisition	8/18/18							FINCA
August 2018 Acquisition Plan (Shefter Demo)	Direct Mail Acquisition	8/18/18							FINCA

Acquisition ROI Report

View a summary of how your acquisition efforts are bringing in new contacts, and the associated revenue across several timeframes.

Report Actions

Applied Filters | Edit Filters

Start Date: 1/2/18–1/2/19

Report Summary

Number of New Contacts	Number of Contributions	Total Dollars	Average Contribution Amount	Cost/$ Raised
2	1	$100 $100.00	$100 $100.00	N/A

Plan Type

Edit Columns

Plan Type	Number of New Contacts	Number of Contributions	Total Dollars	Average Contribution Amount	Cost/$ Raised
Digital Ads	2	1	$100.00	$100.00	N/A
Direct M cquisition				N/A	N/A
				N/A	N/A

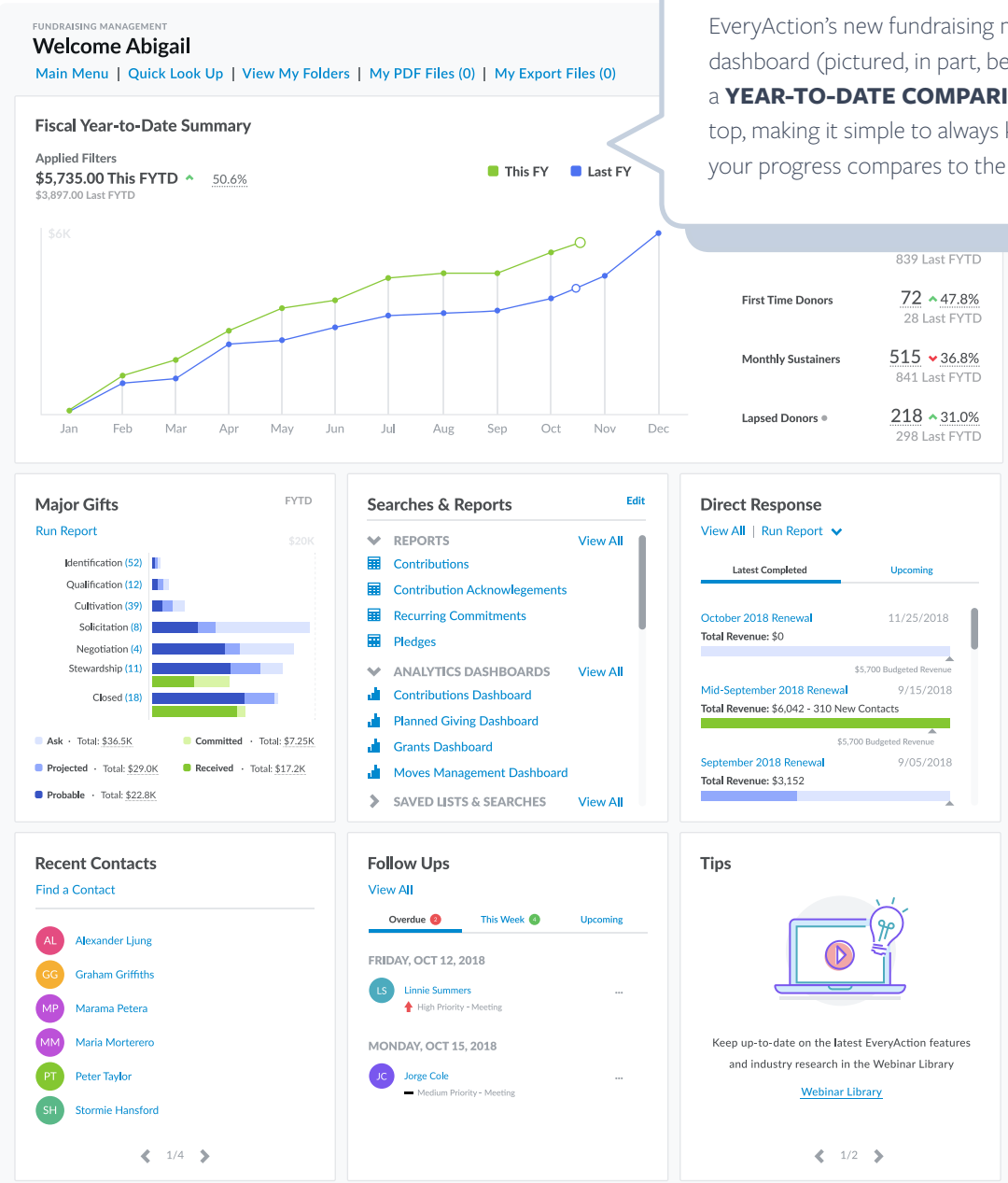
Using this template, grouping by variables like **PLAN TYPE** simplify the report to display the information not by individual efforts, but instead to compare the multiple fundraising methods an organization utilizes.

3

USING DASHBOARDS EFFECTIVELY

A fundraising dashboard gives users a quick, top-of-the-line overview of a broad range of campaigns. Using a dashboard to track various aspects of your Development program helps fundraisers save time and stay up-to-date on program status by eliminating the need to go through the process of pulling reports for certain data sets, instead having them constantly displayed. With data available at all times, staff can easily stay aware of program status, anticipate changes and adapt their actions as necessary.

EveryAction's new fundraising management dashboard (pictured, in part, below) features a **YEAR-TO-DATE COMPARISON** at the top, making it simple to always know how your progress compares to the previous year.



EveryAction Reporting

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Pull reports in a matter of seconds

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