



Data Driven Leadership

Association Fundraising Professionals:
National Philanthropy Day Conference

November 10, 2016

A vertical decorative banner on the right side of the slide. It features a dark background with glowing blue and green abstract shapes, including a large, stylized 'rkl' logo at the top. At the bottom, there is a list of three terms in orange text: 'BRAND INNOVATION', 'MARKET PENETRATION', and 'GLOBAL COMMUNICATION'.

BRAND INNOVATION
MARKET PENETRATION
GLOBAL COMMUNICATION

Who we are



Robin K. Liebowitz, Founder and CEO, rkl3D llc. Robin has more than 25 years of experience working with corporations, non-profits, and governments to deliver tangible brand, marketing, and development solutions. Her work with non-profits incorporates strategic planning, brand strategy, research and analytics, marketing and development planning and implementation. She has assisted healthcare, social services, higher education, environmental/ conservation, and cultural organizations develop more data-driven decision-making, create clearly differentiated brands, reshape and reposition their programs & services, and reach new donor audiences. In addition to her consulting work, Robin is currently a Board Director for the Hudson River Museum. She is also on the Advisory Boards for the Center for International Business Education & Research, and Master of Science in Business Analytics at George Washington University, where she earned both her MBA in International Business and her BBA in Marketing.



Jennifer Younts, Principal, rkl3D llc. For nearly 20 years Jennifer has developed brand, communications and marketing strategies for the global financial services industry, non-profit organizations and trade associations. Jennifer's expertise has furthered growth and increased revenues for organizations ranging from Fortune 500 companies to community-based non-profits. She has successfully rebranded multiple organizations, developed content marketing and thought leadership strategies that led to an increase in demand and sales, launched new products and re-engineered operational processes to enable a more efficient workplace. Jennifer earned a BA in Communications from North Carolina State University, where she conducted post-graduate work in organizational communications. She also holds a BA in Psychology with a concentration on early childhood development and family counseling.



Margaret Goldberg, Executive Director, Greenburgh Nature Center. Margaret has served as the Executive Director of the Greenburgh Nature Center since 2012. Prior to her role as Executive Director of the Nature Center, she served on the Center's Board of Directors from 2004 to 2009, including two years as Board President. During that period she helped spearhead efforts to expand the Center's fundraising reach and developed valuable partnerships with local community businesses and organizations. Currently, she is also a board member of NonProfit Westchester, and a member of Scarsdale Rotary. In addition to her background in the non-profit arena, Ms. Goldberg has a Bachelor of Arts, Psychology degree from NYU, a law degree from Pace University School of Law, White Plains, and has extensive experience in the corporate arena.

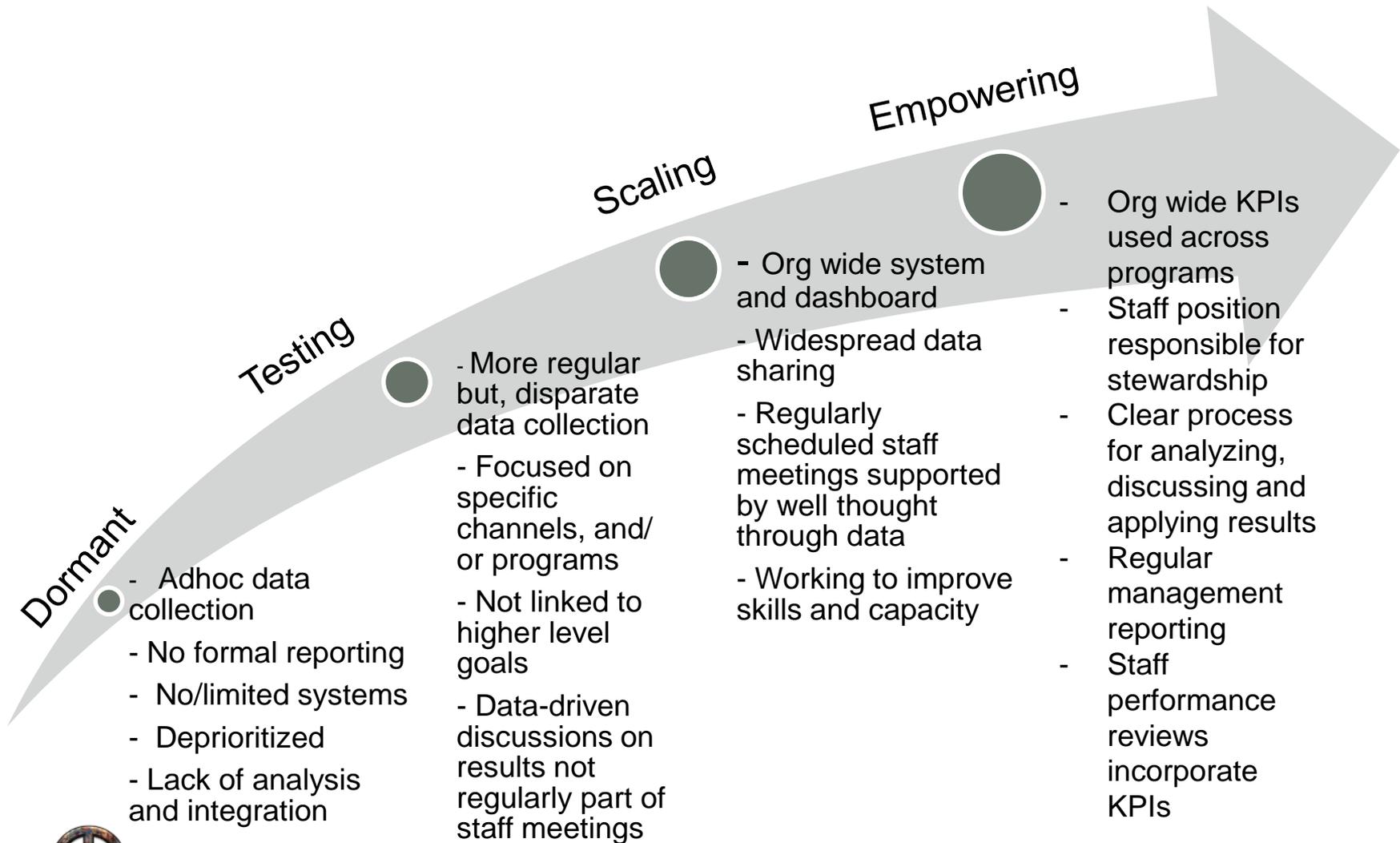


What we hope to achieve today

- Learn to fully embracing data as an integral part of your leadership strategy
- Take steps toward creating a data-informed culture
- Improve your use of data to make more informed decisions around marketing, programming, and fundraising
- Think through the data you already have and making it more actionable



Evolutionary stages of data-driven culture



What it is and what it isn't

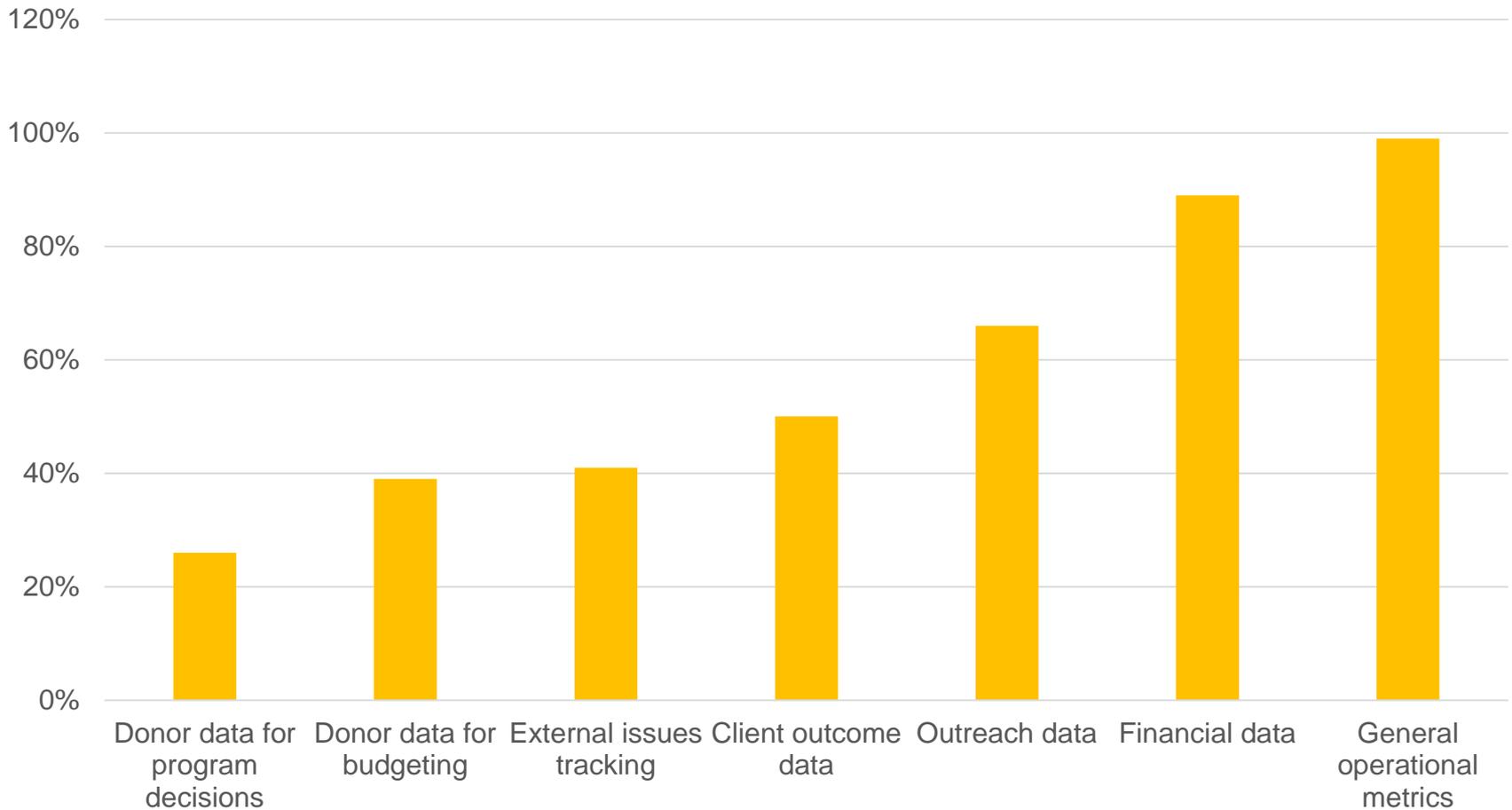
Basic Operational Data

- Anecdotal information
- Adhoc data collection
- Focused on fulfilling reporting requirements

Data Leadership

- Measure effectiveness
- Demonstrate tangible change and impact
- Support strategic planning and collaboration across functions

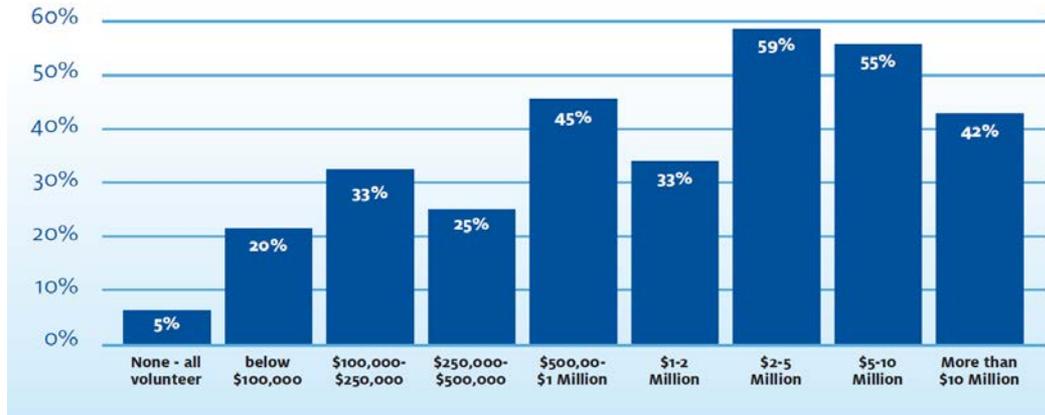
Key data and metrics used by non-profits



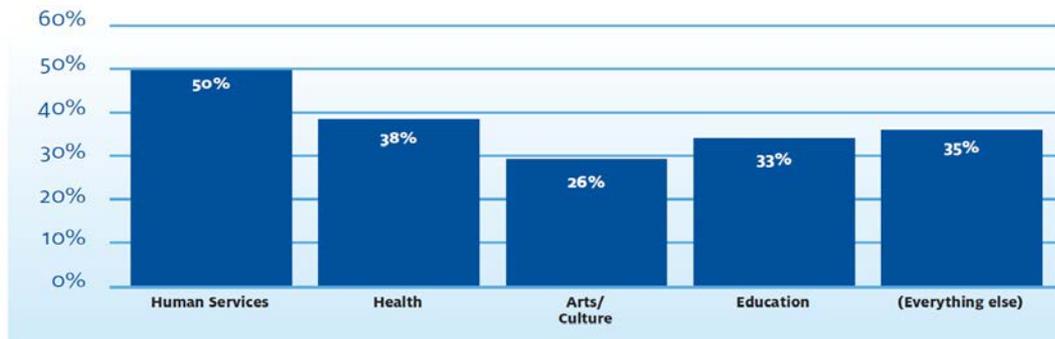
Source:NTEN: The State of Nonprofit Data (November 2012)

There is no one size fits all approach

Larger organizations more likely to track metrics



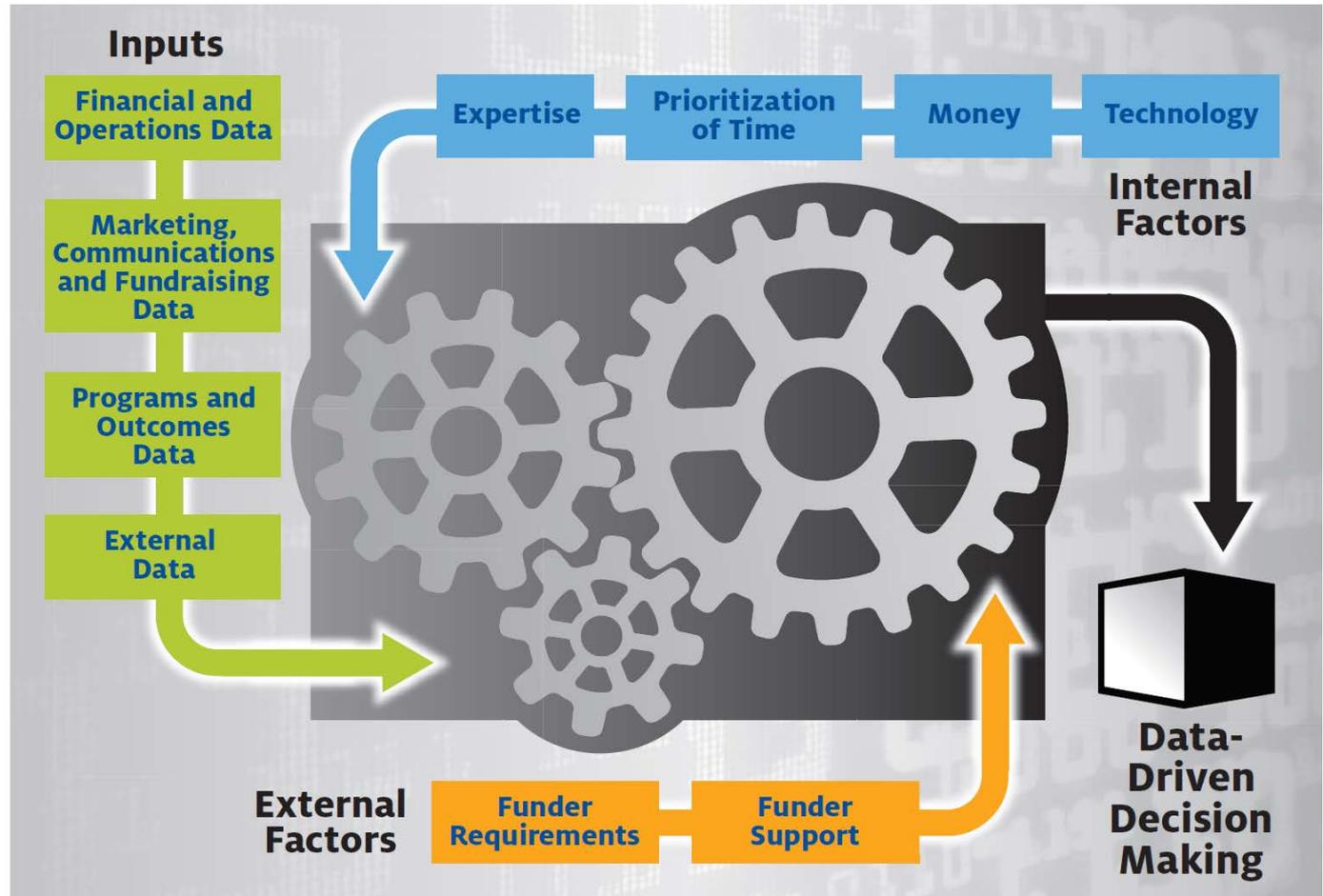
Decision-making processes generally informed by data



The Data Machine

Examples of Data:

- Membership/visitors/clients/donors growth and retention
- Surveys
- Self assessments
- Program effectiveness
- Client outcomes and satisfaction
- Website analytics
- Social media analytics
- Email analytics
- Brand awareness and reputation
- Event
- Cost of acquisition



Source:NTEN: The State of Nonprofit Data (November 2012)

Benefits of data-driven decision making

- Measure progress toward achieving mission
- Measure impact
- Measure financial and operational health
- Determine what is working well
- Identify problems
- Adjust what needs to be improved
- Communicate more effectively
- Enhance, revise, optimize, innovate programs

Barriers to collecting and analyzing data

- Not enough staff/time to collect or analyze data
- Not knowing what data to collect
- Not sharing data/silos
- Not knowing how to use the data
- Competing demands
- Conflicting reporting requirements
- \$\$\$
- Technology limitations
- Privacy and legal issues

Solutions

- Match metrics with mission and goals
- Create a data-driven culture starting at the top
- Think big, but start small
- Prioritize data collection and analysis
- Integrate data collection and analysis into normal operations
- Invest
- Train staff
- Learn from others



Sample solutions providers

Web analytics:

- Google analytics –website traffic, traffic sources, conversions and other site activities
- Facebook Audience Insights - aggregate information about geography, demographics, purchase behavior and more
- ComScore – audience demographic data
- Webtrends – site visitor and behavior analytics
- Adobe Analytics – analytics and segmentation tools
- KISSmetrics –site visitors and behavior analytics

Systems providers:

- Salesforce- Nonprofit Success Pack
- Social Solutions – outcomes management software
- Fluxx – grants management software
- GiveNext.com
- Giftworks
- Donor Perfect

Non-profit data sharing sites:

- National Center for Charitable Statistics
- Data.gov
- GuideStar
- Socrata



Best practices

- GNC: Community event research
- GWU: Brand research – Making History Capital campaign
- [DoSomething](#)
- What are yours?

Data strategy template

Question	Priority	What Data Can Help Answer This?	Where is the Data?	What is the Goal?
Marketing				
Which audiences should we be targeting?				
Which channels are our members/clients/donors using?				
Which messages resonate with which audiences?				
What are the results of my campaigns and what are the costs?				
Development				
What are our donor demographics?				
Which appeals work best on which segments and when?				
What is our donor retention rate and average gift?				
What is our cost per donor and which donors are least likely to give in the future?				
Programs and Services				
Which programs grew the most last year?				
Do participants take part in more than one program?				
What are our client demographics compared to last year?				
Are our programs meeting/supporting our KPIs?				



THANK YOU FOR COMING!

Please contact us with questions at
Info@rkl3d.com

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