UTILIZE YOUR DATA TO DRIVE BETTER DECISION-MAKING

May 25, 2017
RSM Overview

First-choice advisor to middle market leaders, globally

- Largest firm world-wide focused on serving the middle market

- Fifth largest audit, tax and consulting firm in the U.S.
  - Over $1.8 billion in revenue
  - 86 cities and more than 9,000 employees in the United States

- Sixth largest independent network of audit, tax and consulting firms globally*
  - Presence in more than 120 countries
  - More than 38,300 people in over 760 offices
  - $4.6 billion (U.S.) in worldwide revenues

* RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.
Today’s presenters

Mary Beth Jameson
RSM US LLP
Director, Technology and Management Consulting Services
marybeth.jameson@rsmus.com
+1 612 629 9683

Steve Mermelstein
RSM US LLP
Director, Technology and Management Consulting Services
steve.mermelstein@rsmus.com
+1 816 751 1866

Bob Kanzler
RSM US LLP
Director, Technology and Management Consulting Services
bob.kanzler@rsmus.com
+1 856 722 6234
Agenda

• A tale of two organizations
• Risks and self-evaluation
• How to get started
• Solutions and examples
• Q&A
A TALE OF TWO ORGANIZATIONS
A tale of two organizations

“It was the best of times, it was the worst of times”
- Charles Dickens, A Tale of Two Cities

“Why can’t we get better engagement from our community?”

“Our volunteers are so passionate – but we can’t tell to what extent they’re also donors.”

“The most recent Voice of the Constituent results show that we need to focus more on eradicating childhood hunger.”

“Pat has volunteered 150 hours this month and is starting to donate; email is the best way to engage Pat.”
A tale of two organizations (cont.)

“How can we track – and communicate – our successes?”

“These grant reporting requirements are killing us – and we just lost a long-standing funding source because of it.”

“Our goal is to eradicate hunger in grade schools; our studies show it’s decreased 57% in the last five years.”

“Our award management and reporting process is so smooth, we just secured another renewal of a major grant!”
A tale of two organizations (cont.)
A tale of two organizations (cont.)

- Multiple systems
- Each system is not specific
- No tie between systems
- Reporting by spreadsheet
- Data retrieved manually
- Administration and work in siloes
A tale of two organizations (cont.)

- Centralize system
- Seamless integration to
  - Reports
  - Email
  - Event management
- Management interacting with live data
- 360 degree view of individual/company
RISKS AND SELF-EVALUATION
Reasons for disconnected data

- People responsible for a function find a system to use
- Cost
- Siloes work streams
  - Don’t see full value of data
- Limited IT resources
- Focus on mission, not technology
- Organization grew organically
Reasons to manage your data

- Management interacts directly with data
- Automation can take place
  - Thank you emails for donations
  - Marketing automation to allow drip campaigning for donations
- Real connection between campaign and donation
- Connection between donor and employer
- Understand regularity and patterns
Risks of poor data utilization

- Increased manual effort to find relevant data
  - Decreased time available to analyze it
- Inability to meet reporting requirements
  - Potential loss of funding
- Segmented views of the organization
- Frustrated employees, disengaged stakeholders
- Irrelevant or insufficiently communicated mission
- Inability to “compete”
Pitfalls and challenges

- Defining exactly what needs to be measured
  - i.e. “...out of poverty”
  - How do you define “poverty?”

- Utilizing the wrong source of the truth
  - Reliance on incorrect or inaccurate data
  - i.e. out of date spreadsheets or databases

- Analysis paralysis
  - Using too much data/measures
  - Little progress toward your goals

- Don’t have what you need
  - Have not tracked data before

- Confirmation biases
  - Interpreting results in your favor when data may prove differently
Self evaluation – Where do we stand today?

• What are our ______ asking us for?
  − Board members
  − Donors
  − Grantors
  − How do we respond? How much effort is required?

• Can we clearly demonstrate our efficiency and effectiveness to drive our mission outcomes?

• Can we prove (with data) we are getting better?

• What do we measure and how reliable is it?

• What’s the maturity of our capabilities?

• What tools do we have?

You can work with what you’ve got!
Data maturity continuum

01 Foundational
- No single source of truth
- Historical data; analytics describe what has happened
- No formal metrics
- No system or data integration

02 Basic
- Awareness; experimentation into how data can drive business decisions
- Over- or under-measuring
- Subjective decision making
- Manual reporting processes

03 Developing
- Business planning focus
- Standard reporting, ability to drill down
- Integrated and automated technology
- Formal but disconnected metrics

04 Leading
- Strategic, objective, data-driven decision support
- Forward looking strategic analytical focus
- Full utilization of CPM / BI software
- Common, integrated information platform
- On-demand, self-service culture

Crawl - Walk - Run - Fly
How to get started

• Start with the end in mind
• Align directly with mission and desired outcomes
• Select a few outcomes
  – Examples include:
    • Increasing in number of donors, constituents, or volunteers
    • Increasing in size of donations per donor
    • Increase in volunteer hours
    • Increase in campaign responses
• Focus on what you want to accomplish
  – “Increase average grant size by at least 15 percent” is a much more measurable goal than “do better at managing our grants”
• Define goals before implementing or revising technology
Do Your Homework

• Consider using a methodical concept like
  – Plan, Do, Check, Act (PDCA)
  – Define, Measure, Analyze, Improve, Control (DMAIC)

• Don’t over-complicate, but root-cause to find the likeliest triggers for improved performance
  – Engage the right stakeholders
  – Plan or define what you want to do
  – Understand what data you currently have
    • Measure the current baseline of a tangible outcome
  – Make selected changes in activities
    • Informed decisions based on how you interpret the data you have
  – Check your results
    • If they aren’t what you anticipated review your steps and adjust
SOLUTIONS AND EXAMPLES
Example – Goal: Increase average donation size

• What does the data say?
  – Determine the current average donation size
  – Review of how it is determined, and what data source(s) it is being pulled from
    • In order to validate that the number is current and accurate
  – Look at historical trends

• What was happening?
  – Are sharp rises or drops correlated to any internal or external factors?
  – What conditions existed when donation size increased, and could those be replicated?

• Data may not reveal everything
  – Data driven decisions are often better informed
If you’re further along…

• Leverage your results:
  – Celebrate and incorporate in annual report
  – Use “Infographics” to tell story
    • Bold and graphic displays of interesting data driven facts
  – Add real mission impacting success stories to website and marketing materials
  – Strive for growth and expansion of programs
    • Innovate new programs to expand impact

• Not going well:
  – Re-examine data and assumptions and revise as needed
  – Root-cause for potential concerns
  – Obtain a second opinion or different perspective
  – Survey donors, funders, constituents for new ideas
At the right point – leverage technology…

- Develop a data strategy and a data governance structure
- Identify and implement potential tools
  - Business intelligence
  - Customer relationship management
  - Corporate performance management
  - Data warehousing
- Perform advanced analytics to support the whole organization
Person centered
Real world answers

• Who is volunteering but is not donating?
• Who donated last year but has not this year?
• What campaigns has a person taken part in?
• How many new people are volunteering this month?
• Who is related to whom?
• What month yields the most donations?
Dashboards and reporting

Donation Amount by Donation Type

Donation Amount by Address 1: City and Donation Type

Amount by Account Name and Gift Type
Dashboard and reporting (cont.)
Grants management

Donor Performance

Average Gift Size by Type

Gift Type
- Stock Gift: $1,475.43
- Sponsorship: $1,393.00
- Single Donation: $353,123.00
- Pledge: $1,565.00
- In-Kind: $1,000.00
- Grant: $87,533.33
- Contract: $7,000.00

Gift Seasonality

Month (in $K)
- Apr 2017: $330,000
- May 2017: $220,000
- Jun 2017: $110,000
- Jul 2017: $3,000
- Aug 2016: $220,000
- Sep 2016: $110,000
- Oct 2016: $3,000
- Nov 2015: $120,000
- Dec 2015: $40,000
- Jan 2016: $4,000

Leads by Source

Open Leads: Development

Sales Pipeline

Open Opportunities

- Advertisement: $945,000.00
- Employee Referral: $120,000.00
- Partner: $20,000.00
- Trade Show: $10,000.00
- Web: $120,000.00
Grants management

<table>
<thead>
<tr>
<th>Research</th>
<th>Cultivate</th>
<th>Propose</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Reactor: Warm</td>
<td>✔ Capture Summary</td>
<td>✔ Grant dedicated to serve a need</td>
<td>✔ Yes</td>
</tr>
<tr>
<td>✔ Action: Low</td>
<td>✔ Is a Phone Call</td>
<td>✔ Very Interested in go</td>
<td></td>
</tr>
<tr>
<td>✔ Capacity: $60,000.00</td>
<td>✔ Phone Call Details</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Summary**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Contact</th>
<th>Ministry</th>
<th>Target Ask Amount</th>
<th>Purchase Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missions Grant</td>
<td>Andrew Kennedy</td>
<td>Bill and Melinda Gates Foundation</td>
<td>$75,000.00</td>
<td>Green Tree</td>
<td>Grant dedicated to serve a need with a mission for cleaner water in Africa</td>
</tr>
</tbody>
</table>

**Activities**

<table>
<thead>
<tr>
<th>Posts</th>
<th>Activities</th>
<th>Notes</th>
<th>OmitNotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Add Phone Call</td>
<td>Add Task</td>
<td>+++</td>
</tr>
</tbody>
</table>

**Stakeholders**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alex Jackson</td>
<td>Stakeholder</td>
</tr>
</tbody>
</table>

Opportunity Donation Process (Active for 123 days, 15 hours)
## Missions Grant

### Research (Active for 125 days, 15 hours)
- **Readiness**: Warm
- **Inception**: Low
- **Capacity**: $80,000.00

### Cultivate
- Capture Summary
- Initial Phone Call
- Phone Call Details
- Grant dedicated to serving
- Very Interested in gaining

### Propose
- Yes
- Yes
- Planned Gift

### Close

---

### Summary

- **Topic**: Missions Grant
- **Contact**: Andrew Kennedy
- **Account**: Bill and Melinda Gates Foundation
- **Purchase Timeline**: This Quarter
- **Currency**: US Dollar
- **Target Ask Amount**: $75,000.00
- **Purchase Process**: Committee
- **Description**: Grant dedicated to serve a project with a mission for cleaner water in Africa

### STAKEHOLDERS

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alex Jackson</td>
<td>Stakeholder</td>
</tr>
</tbody>
</table>
**Gift management (cont.)**

### Missions Grant

<table>
<thead>
<tr>
<th>Research</th>
<th>Cultivate</th>
<th>Propose</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Complete Final Proposal</td>
<td>✓ Send Thank You</td>
<td>✓ File De-brief</td>
<td>✓</td>
</tr>
<tr>
<td>✓ Present Final Proposal</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ Confirm Decision Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Completed:**
  - 5/16/2017

- **Finished:** Opportunity Donation Process (Completed in 125 days, 15 hours)

### Summary

<table>
<thead>
<tr>
<th>Topic</th>
<th>Contact</th>
<th>Purchase Timeframe</th>
<th>Currency</th>
<th>Target Ask Amount</th>
<th>Purchase Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missions Grant</td>
<td>Andrew Kennedy</td>
<td>This Quarter</td>
<td>US Dollar</td>
<td>$75,000.00</td>
<td>Committee</td>
<td>Grant dedicated to serve a npf with a mission for cleaner water in Africa</td>
</tr>
</tbody>
</table>

### Posts

**ACTIVITIES**

- Add Phone Call
- Add Task

**Notes**

- Bill and Melinda Gates Foundation
- Spoke with Bill and Melinda - need to follow up
- Completed by Zach Greenbaum

**OneNote**

- [Bill and Melinda Gates Foundation](#)
- [Spoke with Bill and Melinda - need to follow up](#)
- [Completed by Zach Greenbaum](#)
- [Today](#)
### Blue Yonder Airlines Pledge - $5,600.00

**General**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>$5,600.00</td>
</tr>
<tr>
<td>Gift Date</td>
<td>10/18/2015</td>
</tr>
<tr>
<td>Tax Deductible Value</td>
<td>$5,600.00</td>
</tr>
<tr>
<td>Last Payment Date</td>
<td>--</td>
</tr>
<tr>
<td>Next Payment Date</td>
<td>--</td>
</tr>
<tr>
<td>Organization Gift Type</td>
<td>--</td>
</tr>
<tr>
<td>Frequency</td>
<td>Recurring Amount</td>
</tr>
<tr>
<td>Recurrence Description</td>
<td>--</td>
</tr>
<tr>
<td>Acknowledge Type</td>
<td>Acknowledged</td>
</tr>
<tr>
<td>Acknowledged Date</td>
<td>--</td>
</tr>
<tr>
<td>Owner</td>
<td>Ashley Byers</td>
</tr>
</tbody>
</table>

**Gift Source Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Blue Yonder Airlines</td>
</tr>
<tr>
<td>Contact</td>
<td>Anonymous</td>
</tr>
</tbody>
</table>

**Related Records**

### Activities

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Reserving</td>
</tr>
<tr>
<td>Activity Type</td>
<td>Activity Status</td>
</tr>
</tbody>
</table>

No Activity records found.

### Installments

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install #</td>
<td>Payment Amount</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------</td>
</tr>
<tr>
<td>1</td>
<td>$100.00</td>
</tr>
</tbody>
</table>
## Active Gifts

<table>
<thead>
<tr>
<th>Name</th>
<th>Account</th>
<th>Amount</th>
<th>Contact</th>
<th>Gift Type</th>
<th>Created By</th>
<th>Gift Date</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract - $7,800.00</td>
<td></td>
<td>$7,800.00</td>
<td>Contact</td>
<td>Ashley Baraba</td>
<td>11/4/2015</td>
<td>11/23/2015 2:53 PM</td>
<td></td>
</tr>
<tr>
<td>Grant - $1,200.00</td>
<td>Aaron Smith</td>
<td>$1,200.00</td>
<td>Grant</td>
<td>Ashley Baraba</td>
<td>1/22/2015</td>
<td>12/2/2015 9:27 AM</td>
<td></td>
</tr>
<tr>
<td>Grant - $14,000.00</td>
<td></td>
<td>$14,000.00</td>
<td>Grant</td>
<td>Ashley Baraba</td>
<td>12/21/2015</td>
<td>12/14/2015 2:13 PM</td>
<td></td>
</tr>
<tr>
<td>Grant - $500,000.00</td>
<td></td>
<td>$500,000.00</td>
<td>Grant</td>
<td>Ashley Baraba</td>
<td>8/1/2016</td>
<td>8/9/2016 2:04 PM</td>
<td></td>
</tr>
<tr>
<td>Pledge - $1,000.00</td>
<td></td>
<td>$1,000.00</td>
<td>Pledge</td>
<td>Ashley Baraba</td>
<td>11/7/2015</td>
<td>11/23/2015 4:32 PM</td>
<td></td>
</tr>
<tr>
<td>Pledge - $2,600.00</td>
<td></td>
<td>$2,600.00</td>
<td>Pledge</td>
<td>Ashley Baraba</td>
<td>10/30/2015</td>
<td>11/23/2015 4:19 PM</td>
<td></td>
</tr>
<tr>
<td>Stock Gift - $1,800.00</td>
<td></td>
<td>$1,800.00</td>
<td>Stock Gift</td>
<td>Bill Caldwell</td>
<td>1/22/2016</td>
<td>3/3/2016 1:17 AM</td>
<td></td>
</tr>
<tr>
<td>Stock Gift - $1,800.00</td>
<td></td>
<td>$1,800.00</td>
<td>Stock Gift</td>
<td>Bill Caldwell</td>
<td>1/22/2016</td>
<td>3/3/2016 1:17 AM</td>
<td></td>
</tr>
<tr>
<td>Stock Gift - $2,800.00</td>
<td></td>
<td>$2,800.00</td>
<td>Stock Gift</td>
<td>Bill Caldwell</td>
<td>1/28/2016</td>
<td>3/3/2016 1:17 AM</td>
<td></td>
</tr>
<tr>
<td>Stock Gift - $3,700.00</td>
<td></td>
<td>$3,700.00</td>
<td>Stock Gift</td>
<td>Bill Caldwell</td>
<td>1/5/2016</td>
<td>3/3/2016 1:17 AM</td>
<td></td>
</tr>
<tr>
<td>Stock Gift - $7,800.00</td>
<td></td>
<td>$7,800.00</td>
<td>Stock Gift</td>
<td>Bill Caldwell</td>
<td>11/2/2015</td>
<td>3/3/2016 1:17 AM</td>
<td></td>
</tr>
<tr>
<td>2015 $250 Donation</td>
<td>Anderson Household</td>
<td>$250.00</td>
<td>Jessica Anderson</td>
<td>Single Donation</td>
<td>Zach Greenbaum</td>
<td>9/6/2016</td>
<td>11/7/2016 11:56 AM</td>
</tr>
</tbody>
</table>
Donor and gift management (cont.)

Donor Performance

Average Gift Size by Type

<table>
<thead>
<tr>
<th>Gift Type</th>
<th>Avg Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock Gift</td>
<td>$17,474.50</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>$9,173.00</td>
</tr>
<tr>
<td>Single Donation</td>
<td>$80,126.00</td>
</tr>
<tr>
<td>Pledge</td>
<td>$13,890.00</td>
</tr>
<tr>
<td>In-Kind</td>
<td>$500.00</td>
</tr>
<tr>
<td>Grant</td>
<td>$87,123.00</td>
</tr>
<tr>
<td>Contract</td>
<td>$1,200.00</td>
</tr>
</tbody>
</table>

Gift Seasonality

<table>
<thead>
<tr>
<th>Month</th>
<th>Sum Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr 2017</td>
<td>$200,000.00</td>
</tr>
<tr>
<td>Sep 2016</td>
<td>$250,000.00</td>
</tr>
<tr>
<td>Aug 2016</td>
<td>$8,400.00</td>
</tr>
<tr>
<td>Feb 2016</td>
<td>$12,600.00</td>
</tr>
<tr>
<td>Jun 2016</td>
<td>$14,000.00</td>
</tr>
<tr>
<td>Dec 2015</td>
<td>$14,000.00</td>
</tr>
<tr>
<td>Nov 2015</td>
<td>$14,000.00</td>
</tr>
<tr>
<td>Oct 2015</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Sep 2015</td>
<td>$13,500.00</td>
</tr>
</tbody>
</table>

Leads by Source

Open Leads - Development

Sales Pipeline

Open Opportunities

- Advertisement
- Employee Referrals
- Partner
- Trade Shows
- Web
Volunteer management (cont.)

Volunteer Management

- Volunteer Hours by Location
- Volunteer Hours by Month
- Volunteer Recruitment by Location

Active Volunteer Locations

<table>
<thead>
<tr>
<th>Contact</th>
<th>Volunteer Date</th>
<th>Number of Hours</th>
<th>Location Name</th>
<th>Location Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jessica Anderson</td>
<td>7/4/2016</td>
<td>8.0</td>
<td>12th Street Community Center</td>
<td>Aaron Smith</td>
</tr>
<tr>
<td>Alex Jackson</td>
<td>9/5/2016</td>
<td>20</td>
<td>Demo Event</td>
<td>Aaron Raza</td>
</tr>
<tr>
<td>Jane Donovan</td>
<td>9/6/2016</td>
<td>25</td>
<td>Johnson County Animal Shelter</td>
<td>David Doppier</td>
</tr>
<tr>
<td>Sri Krishna</td>
<td>10/10/2016</td>
<td>40</td>
<td>Rise Soup Kitchen</td>
<td>Maria Campbell</td>
</tr>
<tr>
<td>Natasha Shah</td>
<td>10/10/2016</td>
<td>1.0</td>
<td>RSM Office Food Drive</td>
<td>Aaron Raza</td>
</tr>
<tr>
<td>Nancy Anderson</td>
<td>10/10/2016</td>
<td>7.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aaron Smith</td>
<td>12/7/2016</td>
<td>8.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

©2017 RSM US LLP. All Rights Reserved.
WRAP UP
QUESTIONS AND ANSWERS?
Contact information for today’s presenters

Mary Beth Jameson
RSM US LLP
Director, Technology and Management Consulting Services
marybeth.jameson@rsmus.com
+1 612 629 9683

Steve Mermelstein
RSM US LLP
Director, Technology and Management Consulting Services
steve.mermelstein@rsmus.com
+1 816 751 1866

Bob Kanzler
RSM US LLP
Director, Technology and Management Consulting Services
bob.kanzler@rsmus.com
+1 856 722 6234
THANK YOU FOR YOUR TIME AND ATTENTION