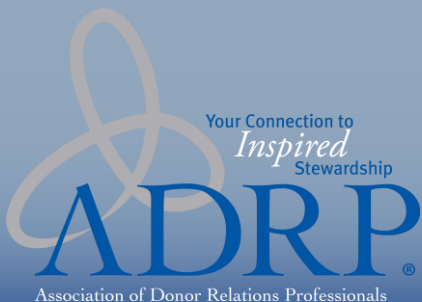


Making Your Data Sing: Creating a Personalized Endowment Reporting Suite

Melody Allen McBeth

Highland Fundraising Solutions, LLC



The Do-Re-Mi of Donor Reports

Disclaimer:

All bad puns and musical jokes are better if taken with a **spoonful of sugar**

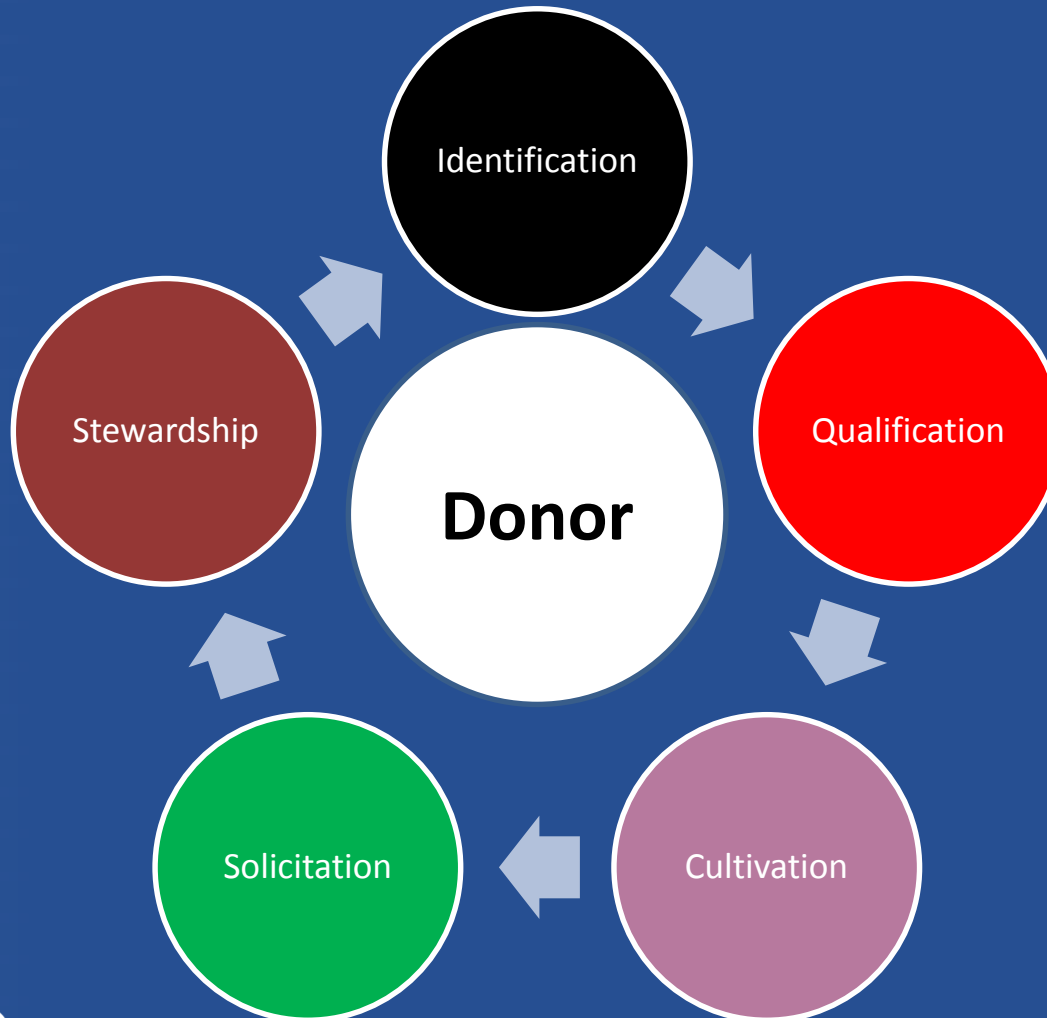
Second disclaimer:

The presenter denies all responsibility for auris tinea*

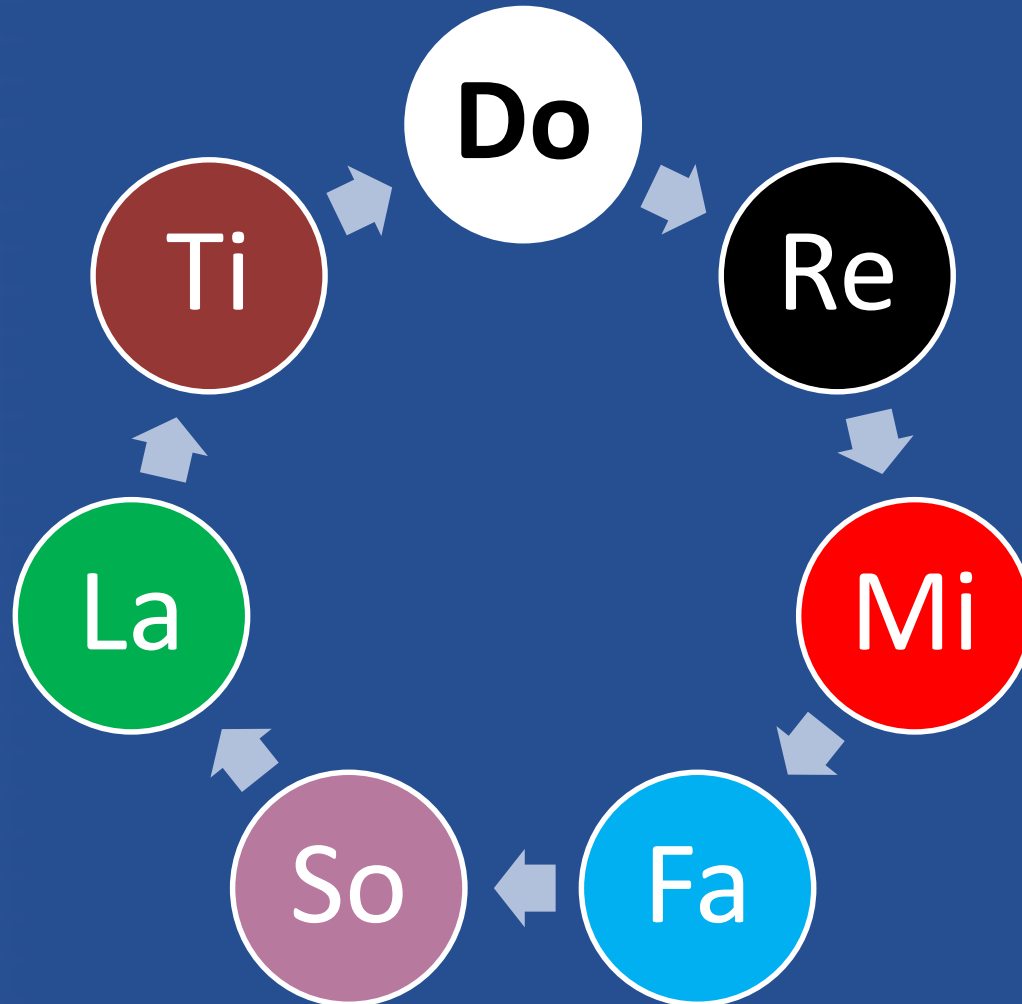


*song-stuck-itis

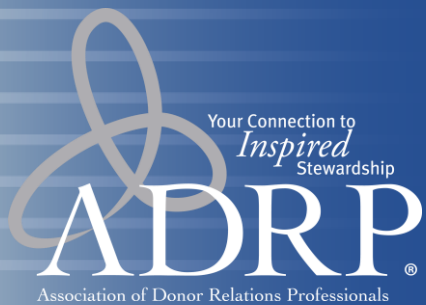
5 Stages of the Fundraising Cycle



7 Stages of the Reporting Cycle



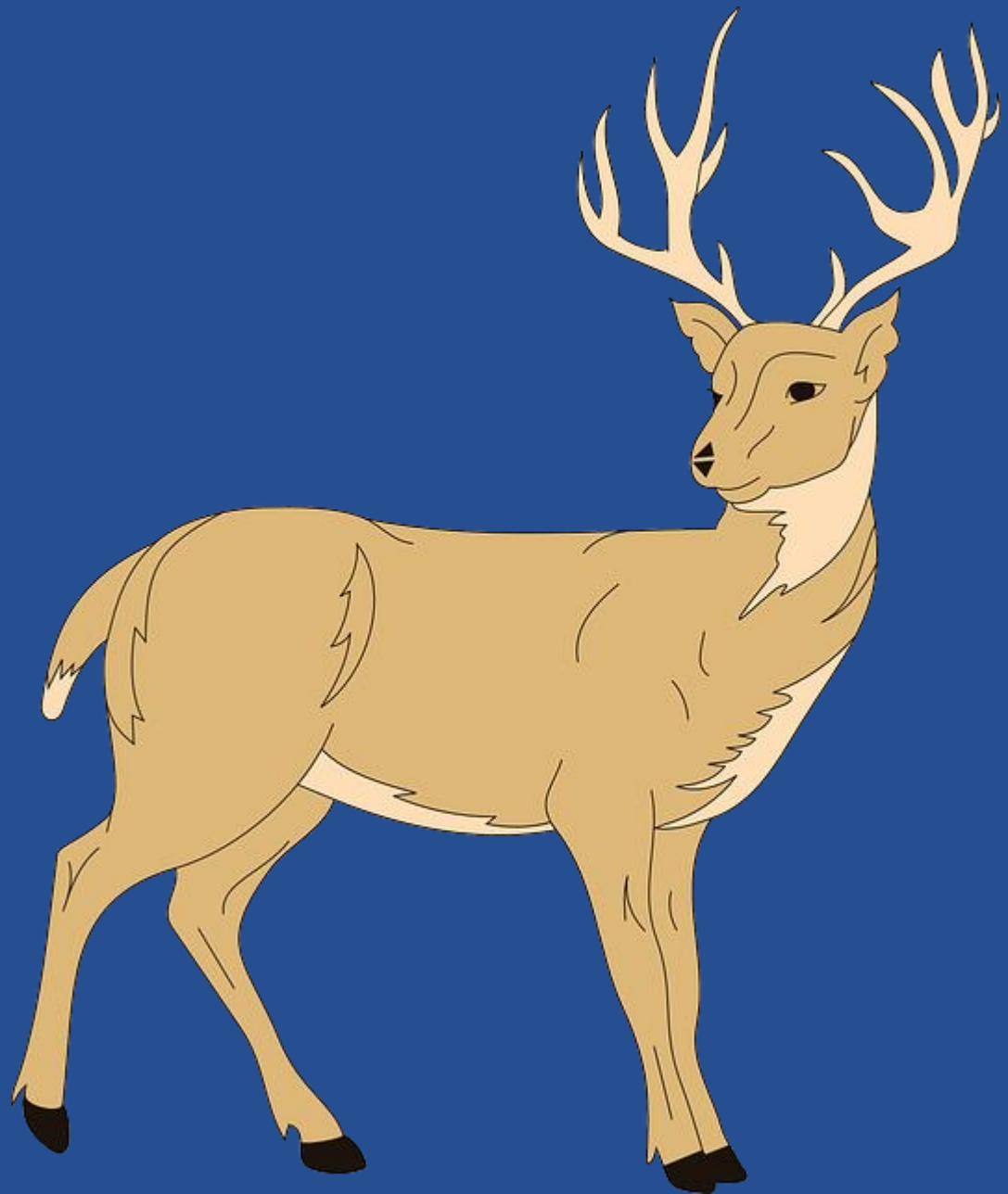
Do



Making Your Data Sing

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Doe



Dough



Dough



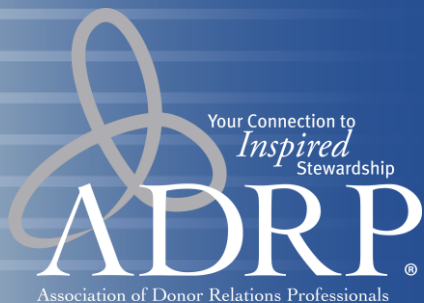
D'oh!

D'OH!

Do-nor



And so the questions begin



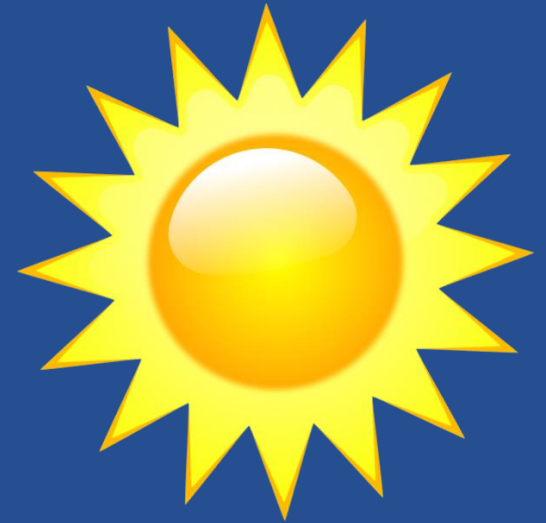
Making Your Data Sing

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Which Donors?

- Current donors only?
 - Or ever givers to an endowed fund
- By cumulative dollar amount
 - Including soft credits
- By fund
- By region
- By interest
- By segment

Re = Reporting



Reporting

What makes up a reporting suite?

- Financial Performance
 - Foundations
 - Corporations
 - Individuals
- Impact
 - Foundations
 - Corporations
 - Individuals

Mi



Mi



Mi

Is it
just
me?

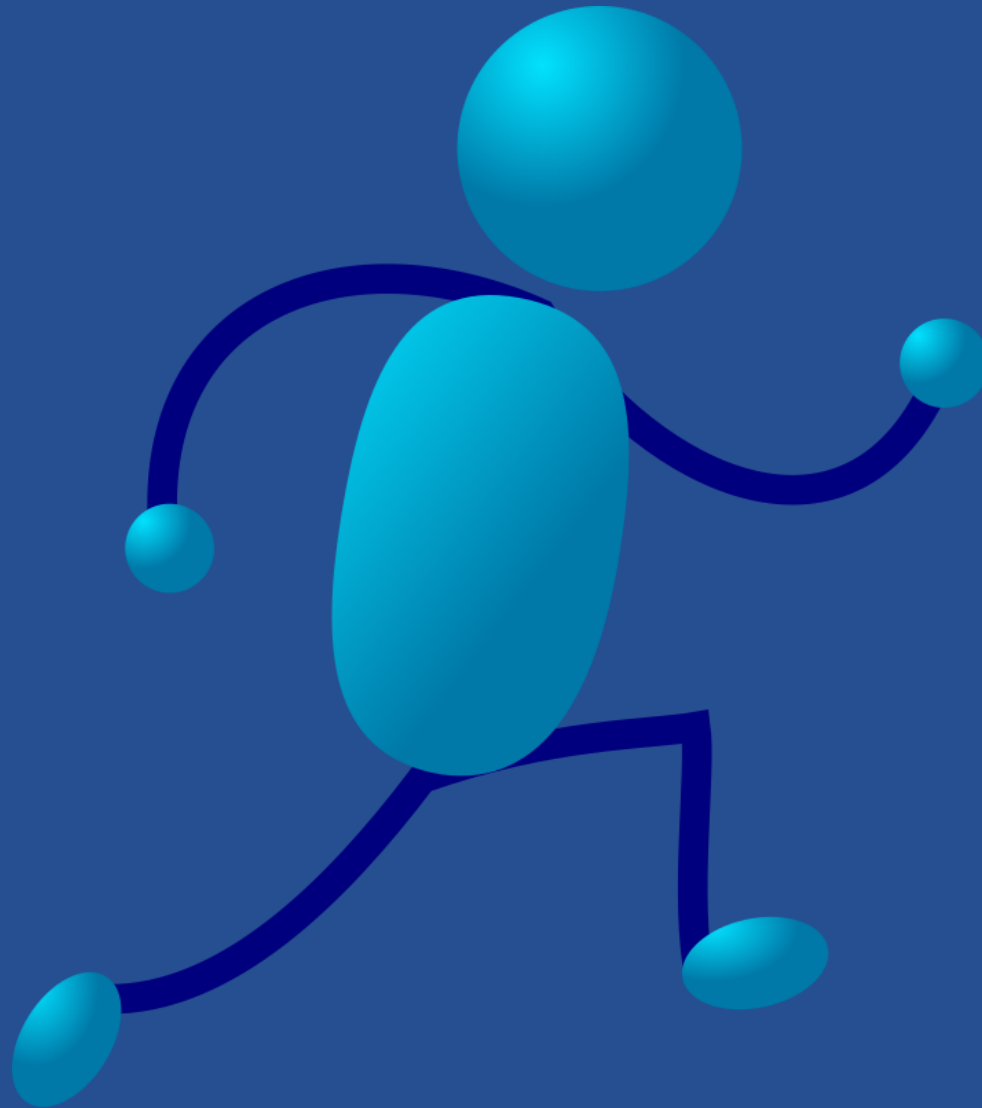
Mi



Know your donor as you know yourself

- **Nonchalant**
- **Online Aficionado**
- **Financially Astute**
- **Impact Oriented**
- **Barely Looks**
- **Shelver**

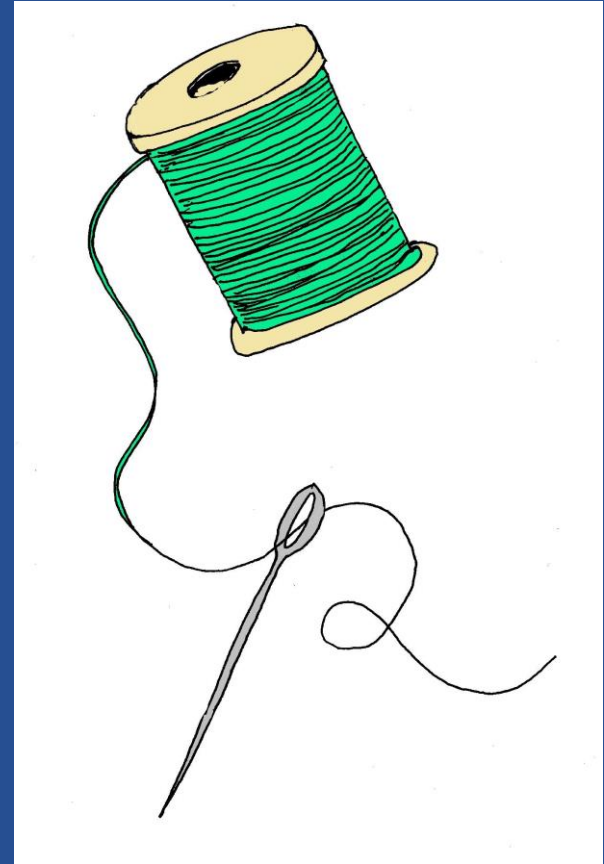
Fa



How far will it go?

- Sustainability
 - Custom Reports
 - “Man”-hours
 - Cost
- Relativity
 - Documentation

So



How to get started?

- Buy-in
 - Leadership
 - Data Services/IT
 - Communications Office
 - Finance Office
- Planning
 - Task Force
 - Focus
- Patience
 - Rome wasn't built in a day

La



The part that follows So....

- Data Integrity
 - Field mitigation
 - Research!
- Needs Analysis
 - Skill sets
 - Work flow
- Key Performance Indicators
 - Financial reporting
- Cooperative Coordination
 - Why can't we be friends

Ti



The stewardship of the thing

- Taking small sips
- Knowing when to push
- How can you help
- Preparation and Production
- Building on the foundation
- Feeding the bear

Do



It's all about the Donor – or how to identify the data points

- Addressees and Salutations
- Fund Names
- Pictures of
students/art/patients/wildlife/beneficiaries
- Financial data
- Impact statements
- Additional information

If it's all about the data points – where are they?

- Donor records
- Fund records
- UDFs
- Notes

Examples, we NEED examples!

- Financial Performance
 - Foundations
 - Corporations
 - Individuals
- Impact
 - Foundations
 - Corporations
 - Individuals

- Financial Performance
 - Foundations
 - Corporations
 - Individuals
- Impact
 - Foundations
 - Corporations
 - Individuals

[Report FF](#)

[Report FC](#)

[Report FI](#)

[Report IF](#)

[Report IC](#)

[Report II](#)

LETTERHEAD

DATE

ADDRESSEE BLOCK

LIST OF FUNDS

SALUTATION

The niceties, how much we love you, why we appreciate you, the impact your gift has made.

FINANCIALS

ANECDOTALS

Closing statements

Signatory(s)

- Financial Performance
 - Foundations
 - Corporations
 - Individuals
- Impact
 - Foundations
 - Corporations
 - Individuals

[Report FF](#)

[Report FC](#)

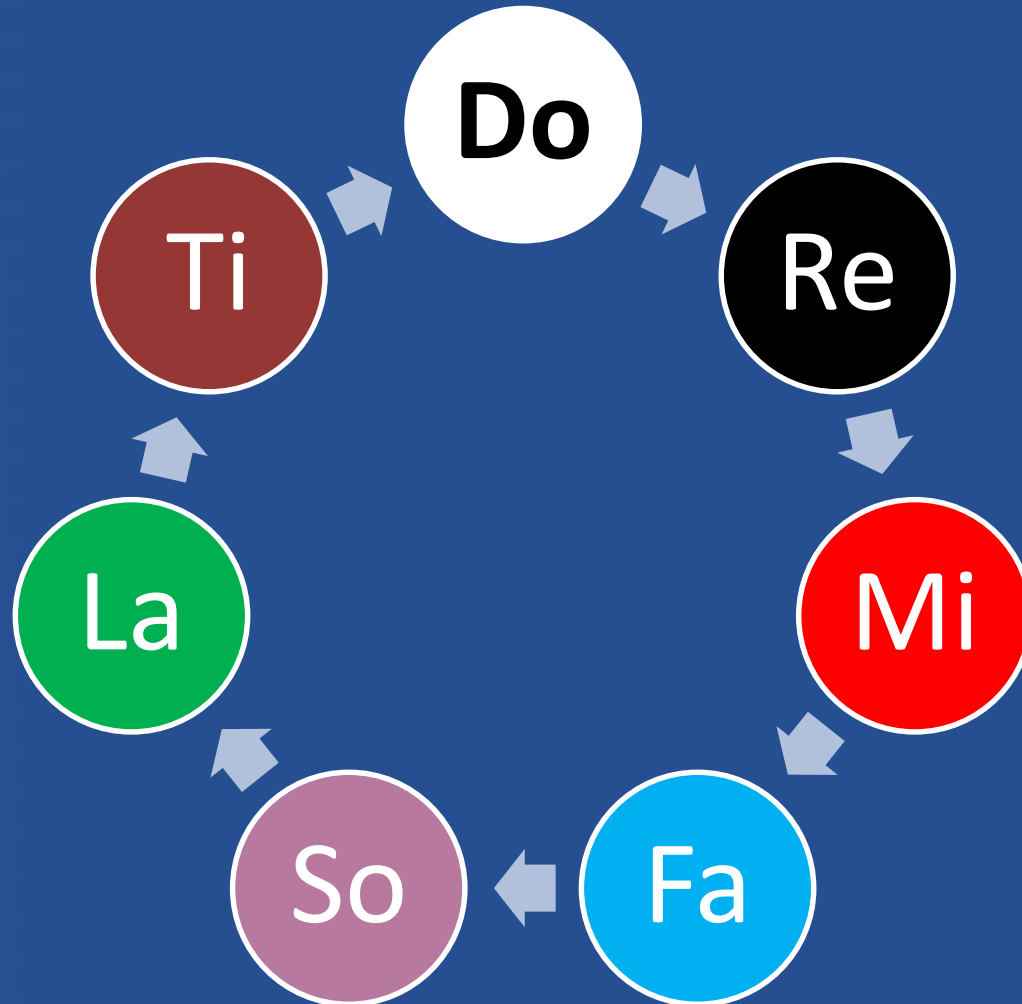
[Report FI](#)

[Report IF](#)

[Report IC](#)

[Report II](#)

7 Stages of the Reporting Cycle



Do = Donor

Re = Reporting

Mi = Not for me, for THEM

Fa = Sustainability

So = What comes next

La = putting it together

Ti = the (internal) stewardship of it

Do-n't lose focus!

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