Fundraising Analysis and Reporting

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The Key Business Issue

The typical fundraiser is a people person, who does not necessarily engage well with figures. They are good at organising entertaining parties where everyone has a good time. The Business Intelligence system allows them to focus more on generating fund-raising income, by easily identifying who are the most valuable donors, which events are the most successful in terms of fundraising, and to measure the success of strategies and initiatives in terms of funds generated. It also helps down to the level of individual donors. If someone has given large amounts in connection with an event in the past, are they still attending; if not, why not. The principle is based around RFM (Recency-Frequency-Monetary Value)

Summary of Fundraising Analysis and Reporting Functionality

Example Measures:

Donation Amounts, Pledge Amounts, No. Responders to Mailing Campaign, Average Donation per Response, Median Donation, Number of Attendees at an Event

Example Dimensional information:

Date: e.g. Financial or Calendar Year, Value aggregated per Quarter, Month, Week, Day etc, including monthly and weekly trend graphs, comparison against prior years, comparison against budget/target

Source of Donation: e.g. Events (Dinner, Sports Day etc), Direct Marketing Campaign, Gift Certificates, Internet via Web Site, Legacies, Youth Group, Women's Group

Category Of Donor: e.g. Patrons, Major Donors. Donation history and RFM (Recency-Frequency-Monetary Value) for every donor. Age range of donor. Gender, Geographical location. Grouping donors in the same household or organisation.

Income Type: e.g. Net Value, Gift Aid, "Soft" credit (A soft credit is where one contact influenced another contact to donate – e.g. Husband and Wife attend a dinner, husband writes the cheque, but wife is an equally important contact.)

Payment Type: e.g. Cash, Credit Card, Paypal

Destination of Donation: Project on which each donation was used

At Ridgian, we have developed a solution that contains a number of standard performance measures, with a series of scorecards (Key Performance Indicators, KPIs), pre-defined reports, charts and tables, that allow management to measure, monitor and manage performance, and specifically in relation to the business issues raised above.

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Solution Features

Features include:

- Web-based information available over the Intranet/Intranet with no desktop software to deploy.
- Filters and drill down allow for "slice and dice" style analysis of data
- All reports can be exported into Excel, PDF, PowerPoint (for presentations)
- Each user is automatically routed to information appropriate to their role and responsibilities i.e. Executives, Managers
- Key Performance Indicators give "At a Glance" view of performance against targets and objectives
- Mentoring to ensure Client technical staff gain the necessary BI skills
- Rapid Return on Investment, can be implemented in a short time frame
- Results are detailed at any level of your hierarchy and for any time period
- Independent of existing back end systems

A business intelligence solution built on Microsoft technologies:

- Data Warehouse with automated nightly process to load and cleanse data from various operational systems, built on SQL Server 2005.
- Microsoft SQL Server 2005 Analysis Services (SSAS) – OLAP Cubes
- Microsoft SQL Server 2005 Reporting Services (SSRS) – Web-based reporting

The Business Benefits

- Timely, accurate and appropriate information available
- Staff empowered to make better-informed decisions
- Ease of implementation and deployment
- Can be rolled out to increasing numbers of users at no incremental cost (Server licence only)
- Client staff trained to maintain and enhance the system in house

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For More Information

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