DATA WORKSHOPS

October 2017

CanadaHelps.org
giving made simple

THANK YOU FOR JOINING US!

Shawn Bunsee, Director, Data & Analytics, CanadaHelps
Shannon Craig, Chief Marketing & Product Officer, CanadaHelps

Agenda.

Welcome to the Data Literacy Workshop!

Introduction.

30 Minutes
Using data to impact your Fundraising and Impact Goals

Data 101.

1 Hour + 15 Minute Break
A gentle introduction to data through the charity data framework, in addition to a group exercise

Data Process.

1 Hour
An overview of the steps required to plan, prepare and execute against your data

Breakout Sessions!

30 minutes
Breakout sessions to help you create your own data action plan

Objective.

To engage charities and communities through training webinars and workshops on data literacy *to support their Fundraising and Impact initiatives*

THANK YOU TO THE ONTARIO TRILLIUM FOUNDATION

Funding of a multi-year, multi-faceted data strategy initiative, including:

- Charity Benchmark Reports

- Donor Tools

- Data Literacy Workshops

- Public Dashboards
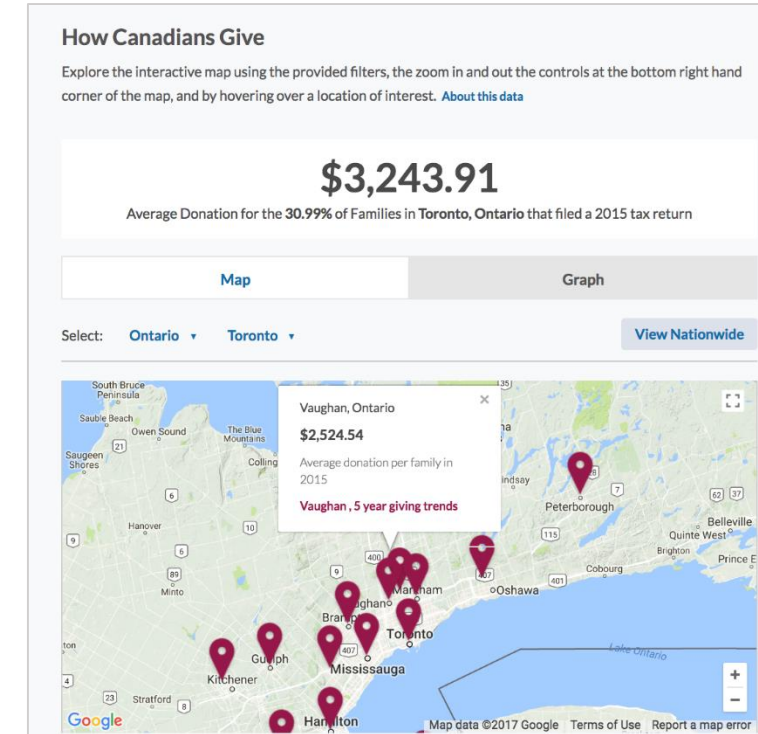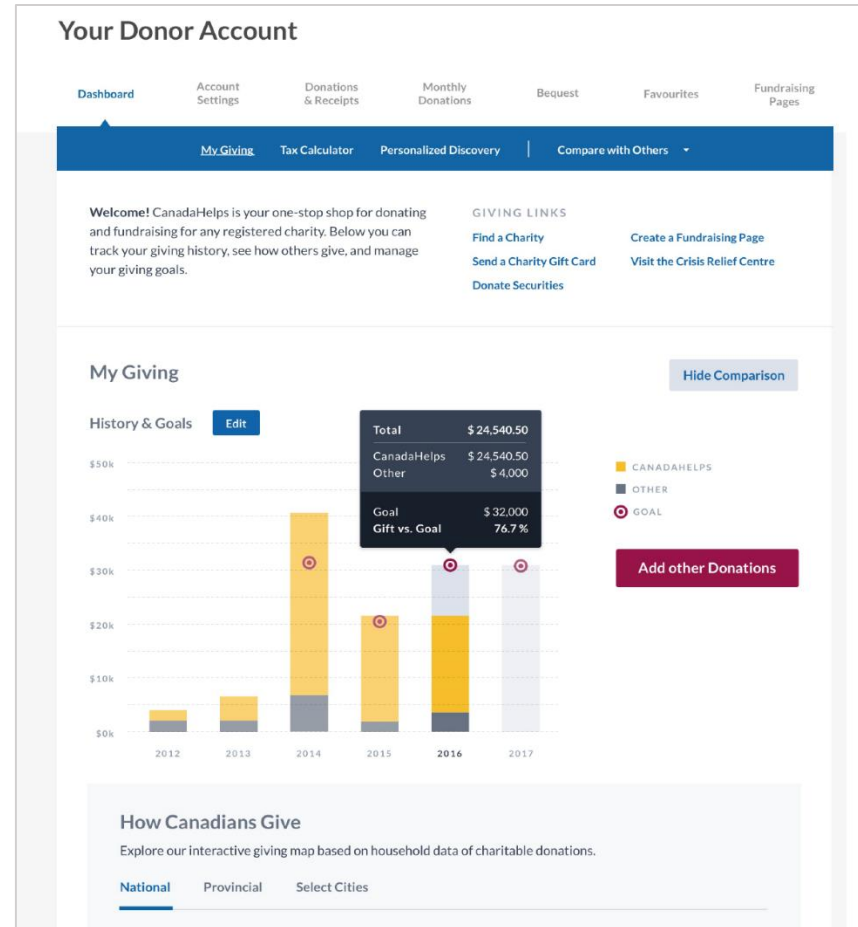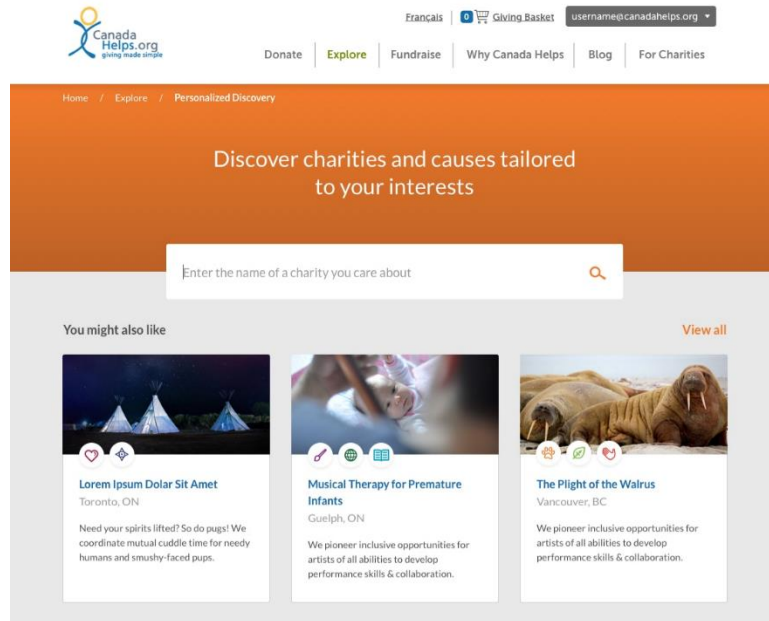
Fundraising & Impact.

How to use data to impact your Fundraising
& Impact goals

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Impact.

A significant, positive change that addresses a pressing social challenge.

Setting an Impact goal

What is the change that you are looking to make in society through your organization?
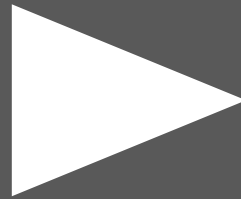
Using data to reach this goal

How can you use data to track, measure, and meet your Impact objective?

Impact in action

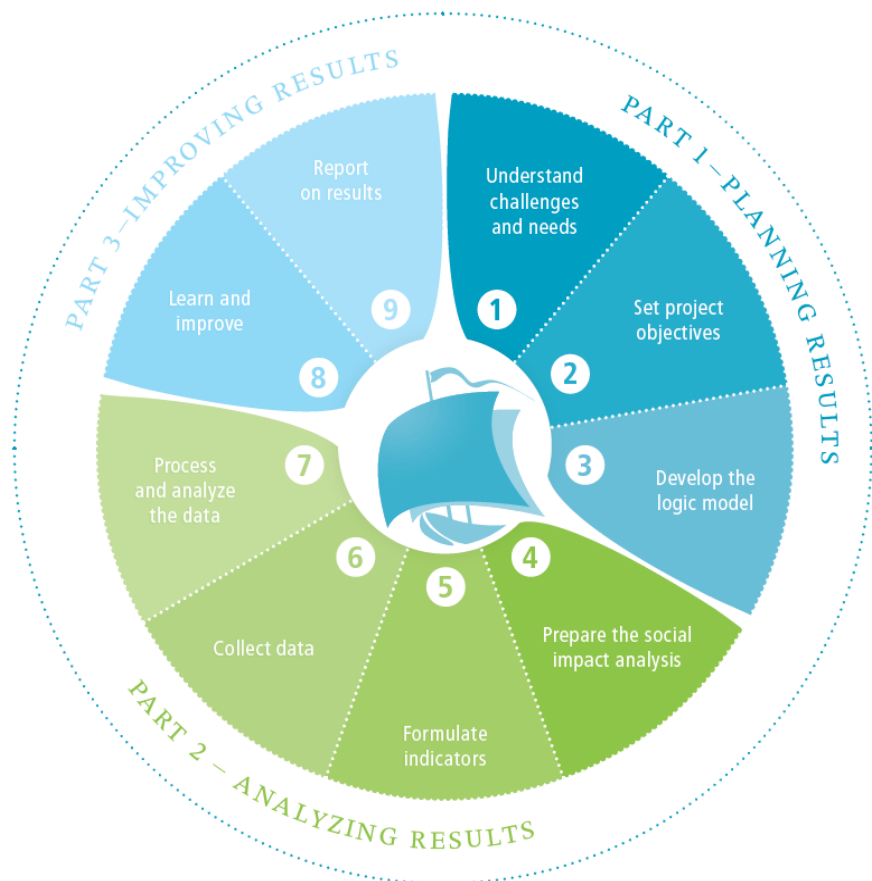Video to be inserted (not included for size)

▶

The Impact Orientation & Results Framework

CanadaHelps has partnered with PHINEO to develop a practical guide to developing and measuring an impact orientation

Impact Orientation

Setting the right goals

Results Framework

Measuring Success

Your Guide to Impact

The Impact Navigator details how to set up your orientation, and how to measure your results in greater detail. It is a helpful guide for targeting better results and recommending a place to start if you are looking for assistance in setting or reaching your impact objectives.

Download your free copy!
You can download your free copy of Impact Navigator from your *CanadaHelps Charity Admin Account* in the "Impact" section.

Fundraising.

The process of gathering voluntary contributions of money or other resources

Setting a fundraising goal

What are the resources that you need to collect in order to reach your fundraising objective?

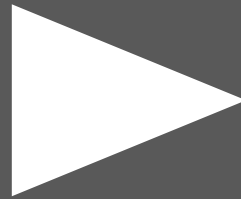**Using data to reach this goal**

How can you use data to track, measure, and meet your fundraising objective?

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Fundraising in action – an overview

CanadaHelps.org

Video to be inserted (not included for size)

Using data to meet your fundraising objectives

Stages and techniques for using your data to meet and exceed your fundraising objectives

Know your donors

Campaign strategy & planning

Communication Execution

Stages & techniques

- Research
- Analytics and analysis
- Supporter segmentation
- Identify untapped opportunities

- Create a campaign brief
- Success metrics
- Test & learn

- Campaign Execution
- Reporting

Using data to meet your fundraising objectives

Opportunities created through data
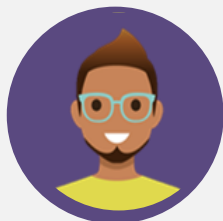
Know your donors

Campaign strategy & planning

Communication Execution

Opportunities through data

- Lift results with personalization
- Reduce new donor acquisition costs
- Cultivate loyal donors and ambassadors

- Learn how to time your appeals
- Optimize donation amount asks
- Grow your monthly donor base

- Nurture to get first gift
- Time appeals to reduce lapse rate
- Optimize donations
- Secure major donors

Data 101.

An introduction to data

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Why does data matter?

Measure Performance
Track key metrics that drive your business

Increase Efficiency
Optimize efforts that yield the best results

Glean Insights
Discover key learnings on what drives performance and why

Understand Donors
Identify who your best donors are and engage them

Are you a…

Data Guru

"I'm **confident with data** and analytics. Advanced Regression Analysis, Factor Analysis—you name it."

Numbers Connoisseur

"**I live, eat and breathe the stuff**. Sometimes it falls outside of my comfort zone but I pick it up easily."

Dibble-Dabble Enthusiast

"I **enjoy experimenting** with different data platforms like Google Analytics and social media insights tools, but I'm always learning."

Shy Numbers Guy

"I'm only **comfortable with basic data** and metrics that I need in my specific job (e.g. fundraiser, book keeper, etc.)."

Not my Forte, OK?

"I **quiver at the thought** of working with data, analytics and almost anything numbers-related."

The results…

When it comes to data and analytics, I consider myself a….

Data Guru

Not my Forte, OK?

2%

11%

Numbers Connoisseur

44%

34%

Shy Numbers Guy

Dibble-Dabble Enthusiast
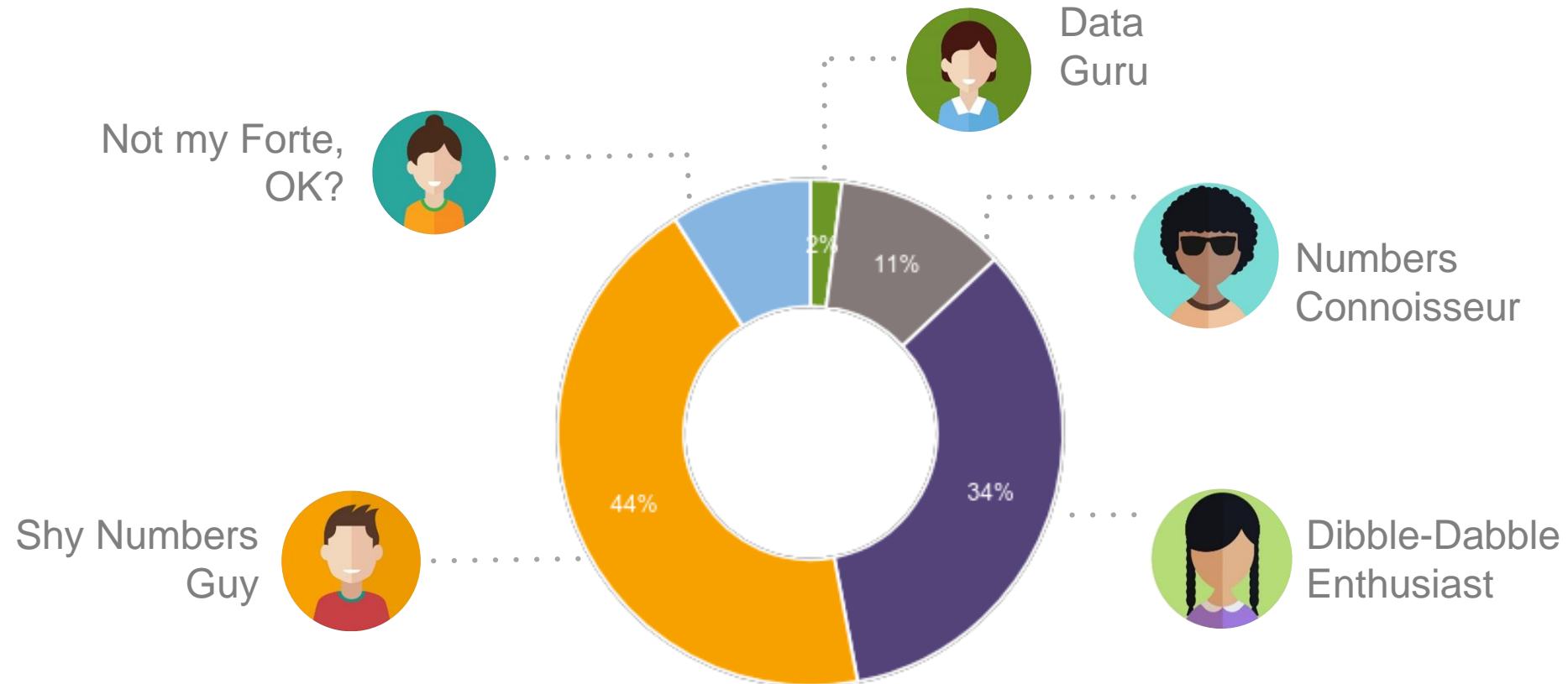
So...what is data?

There are two types of data

Quantitative Data

Numbers, things that can be measured and counted

Qualitative Data

Things that can be observed but not measured

Discrete

Based on counts, can only be certain values (e.g. Number of M&Ms in a bag)

Continuous

Data that can take on any value in a range (e.g. height, time, temperature)

Three steps to tackle your data

Did you know?

90%
of the world's data was created in the last 2 years
-IBM

Given that there is so much data, it's easy to feel overwhelmed or to neglect all of the data coming your way. But don't worry about big data, even we at Canada Helps do not have big data...yet.

By staying focused on the **three essential steps** in the data management process, you can strengthen your organization, achieve its mission and even set the foundation for big data.

Plan → **Prepare** → **Execute**

The Charity Data Process
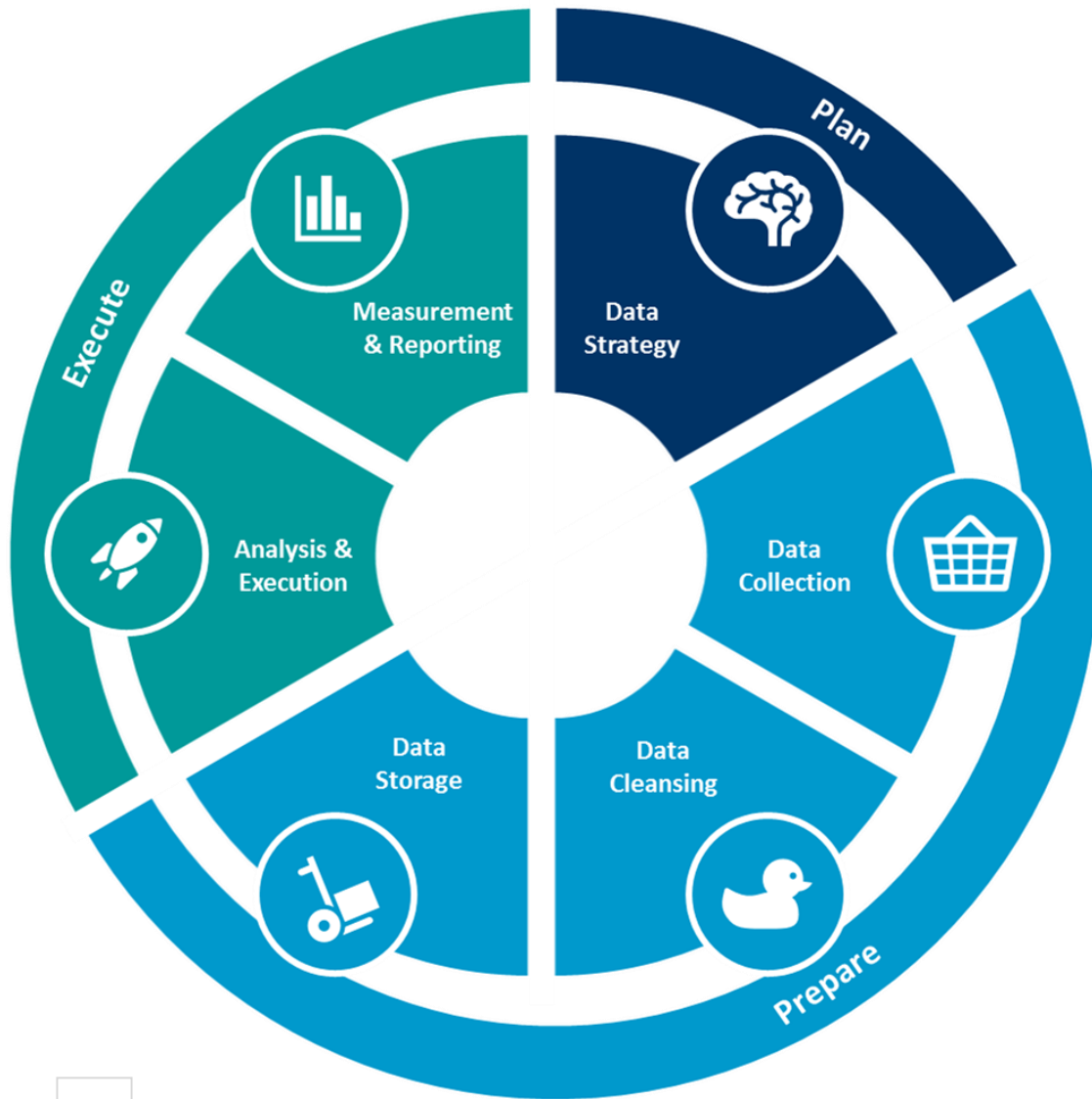
Plan

Start with your business objectives which inform your data strategy. Once you have established a data strategy that meets your business objectives, follow these two steps:

Prepare

Gather all data that is relevant to your donors, your organization, and its mission. Establish a routine to keep data updated and fresh. Regularly seek out new types of data to improve your reporting.

Execute

With all that great data, you can develop short-term and long-term strategies, improve donor communications, accurately and quickly report successes and setbacks, and motivate your team towards your mission.

Using data to drive, meet and inform your goals

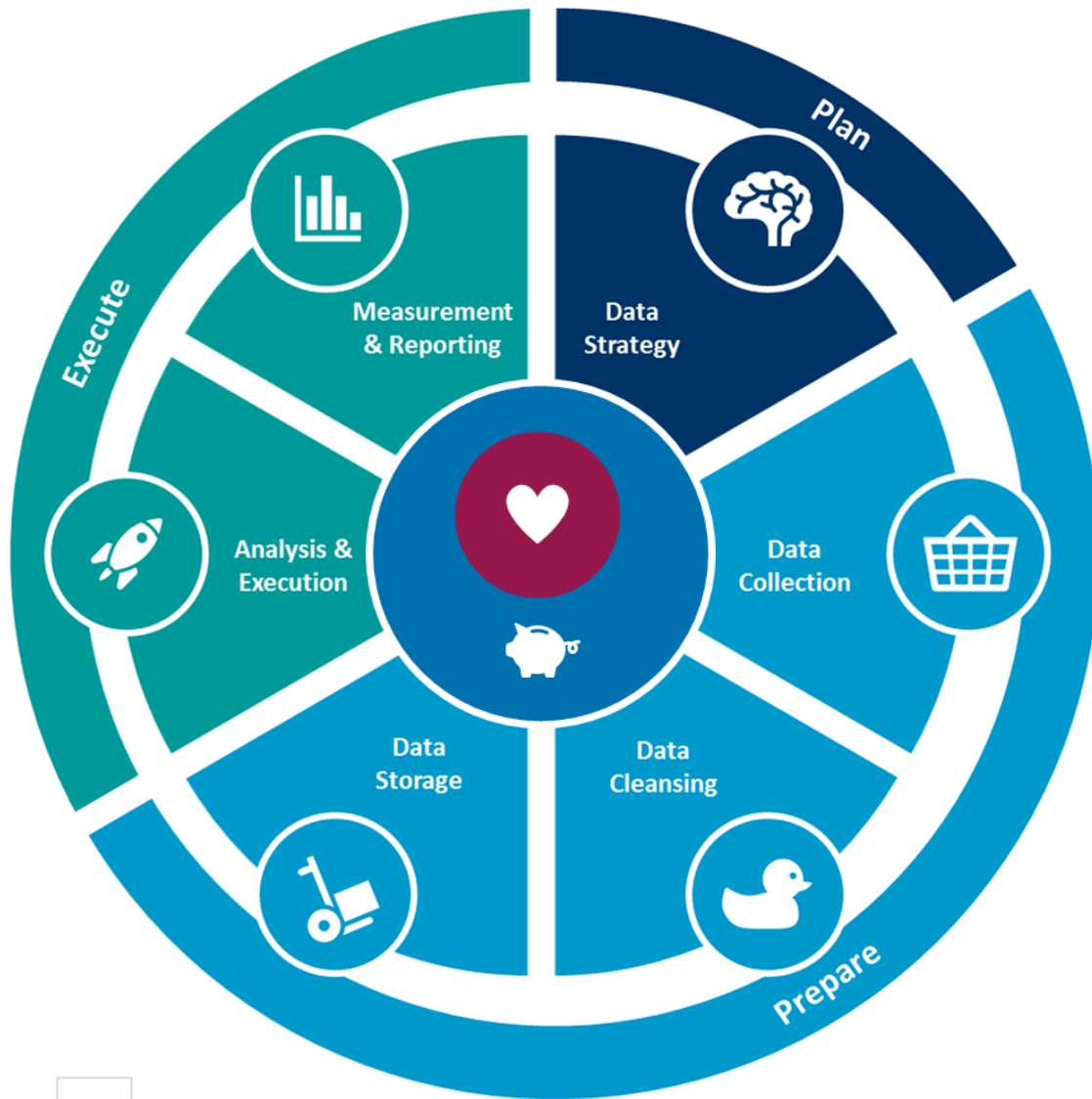Your Impact and Fundraising goals inform data planning, preparation and execution which then in turn feed into your goals.

Data can fuel your Impact goals by:
- Measuring the effects of your impact
- Determining what you're achieving with your work
- Continuously improving your work's results
- Communicating the results of your work more effectively

Data can help drive your Fundraising planning by:
- Planning results
- Setting key performance metrics
- Identifying your baseline
- Tracking and measuring against your key objectives
- Gaining insights into which strategies are working and which are not

Data Strategy
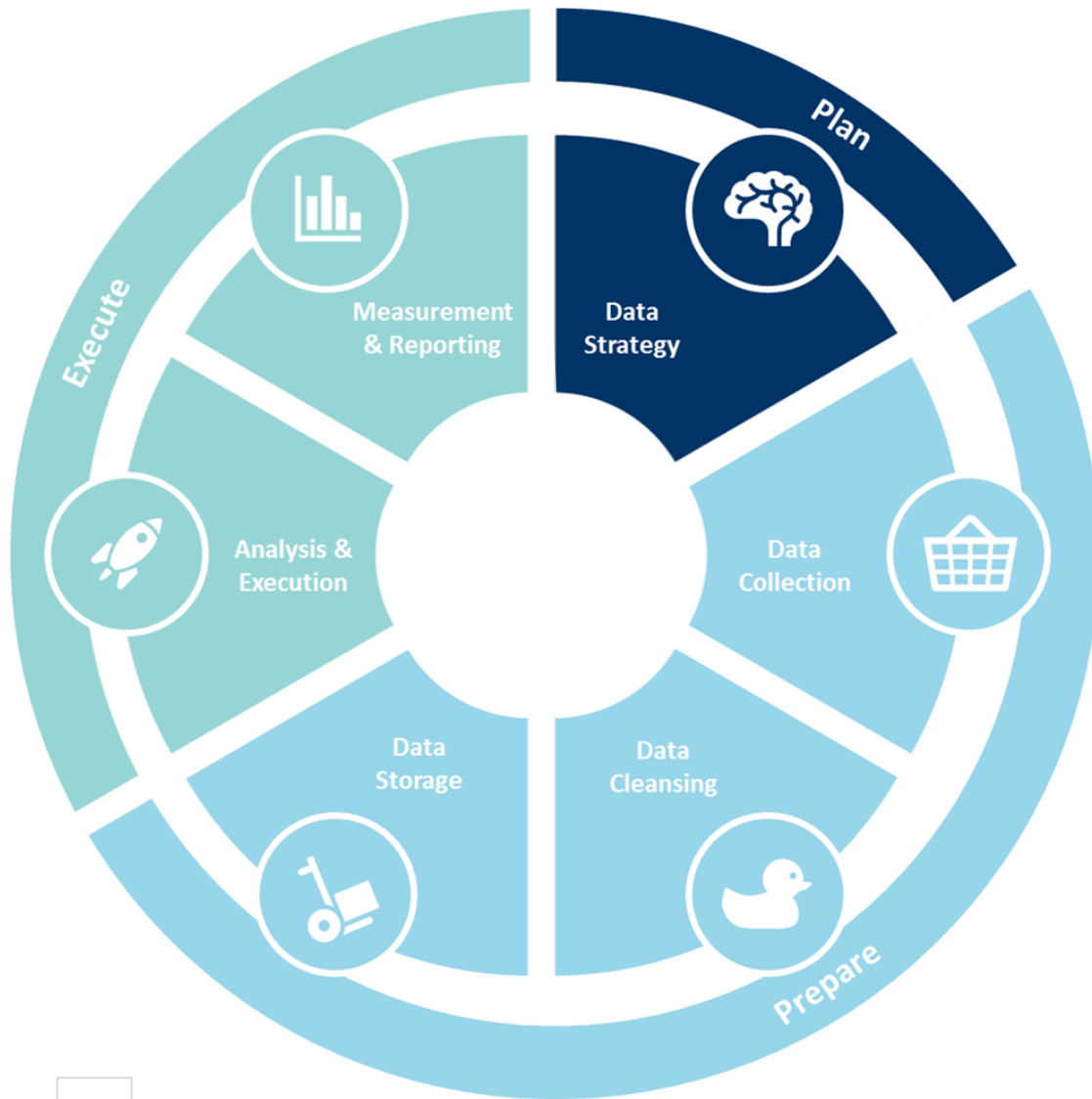
What is it?

Data strategy is the process of identifying what data elements will be critical for running the business, and aligning your systems to capture and utilize that data adequately across:

- Data collection
- Data cleansing
- Data storage
- Data analysis
- Data execution (e.g. for Marketing)
- Data reporting

Why is it important?

A sound data strategy will allow you to effectively measure the performance of your business and glean insights into what drives that performance.

Data Collection
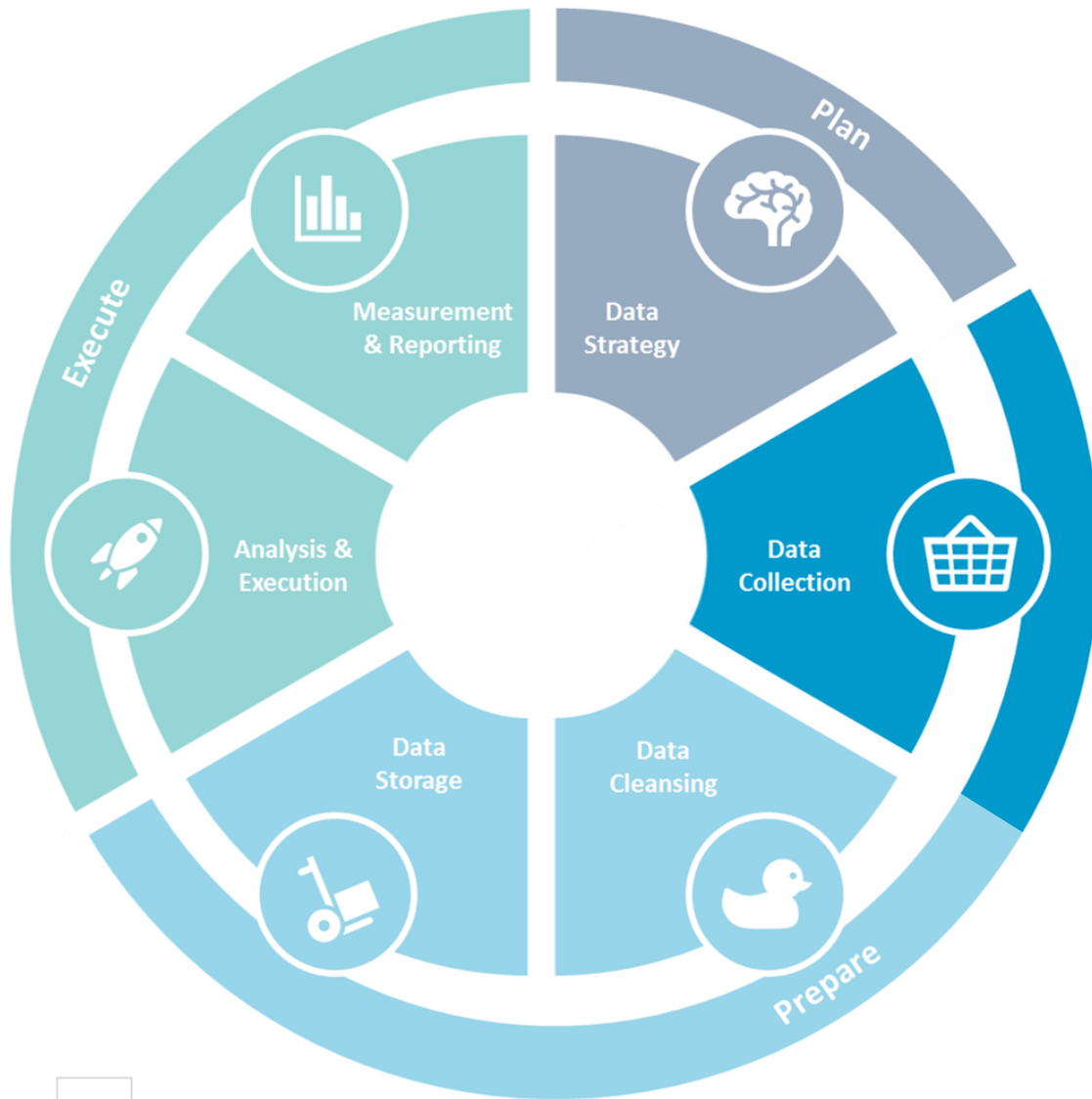
What is it?

Data Collection is the process of gathering information across the business, such as:

- Supporter information
- Supporter history
- Program data
- Survey data
- Event data
- Financial data

Why is it important?

Collecting data from various sources—and analyzing it—will enable you to get a broader picture of what is driving your business.

Data Cleansing
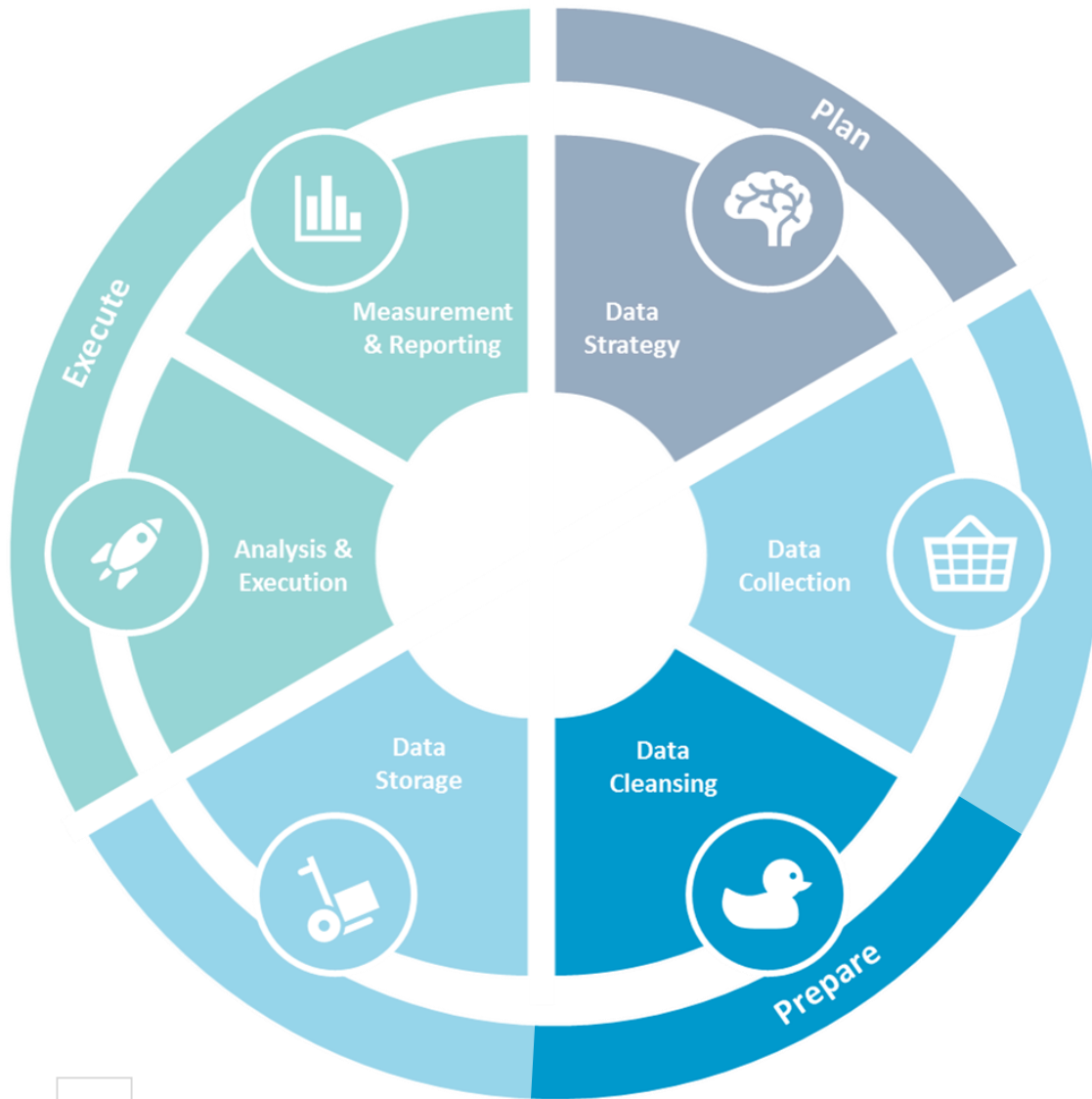
What is it?

Data Cleansing is the process of standardizing your data in such a way that it is accurate. Key data cleansing examples include:

- Deduplication of records
- Address accuracy
- Email address standardization
- Linking donors in the same household
- Linking donor profiles
- Categorizing raw data

Why is it important?
Uncleansed data can lead to a misrepresentation of numbers, inaccurate reporting, a poor customer experience, and missed opportunity to communicate with donors (e.g. bad address).

Data Storage
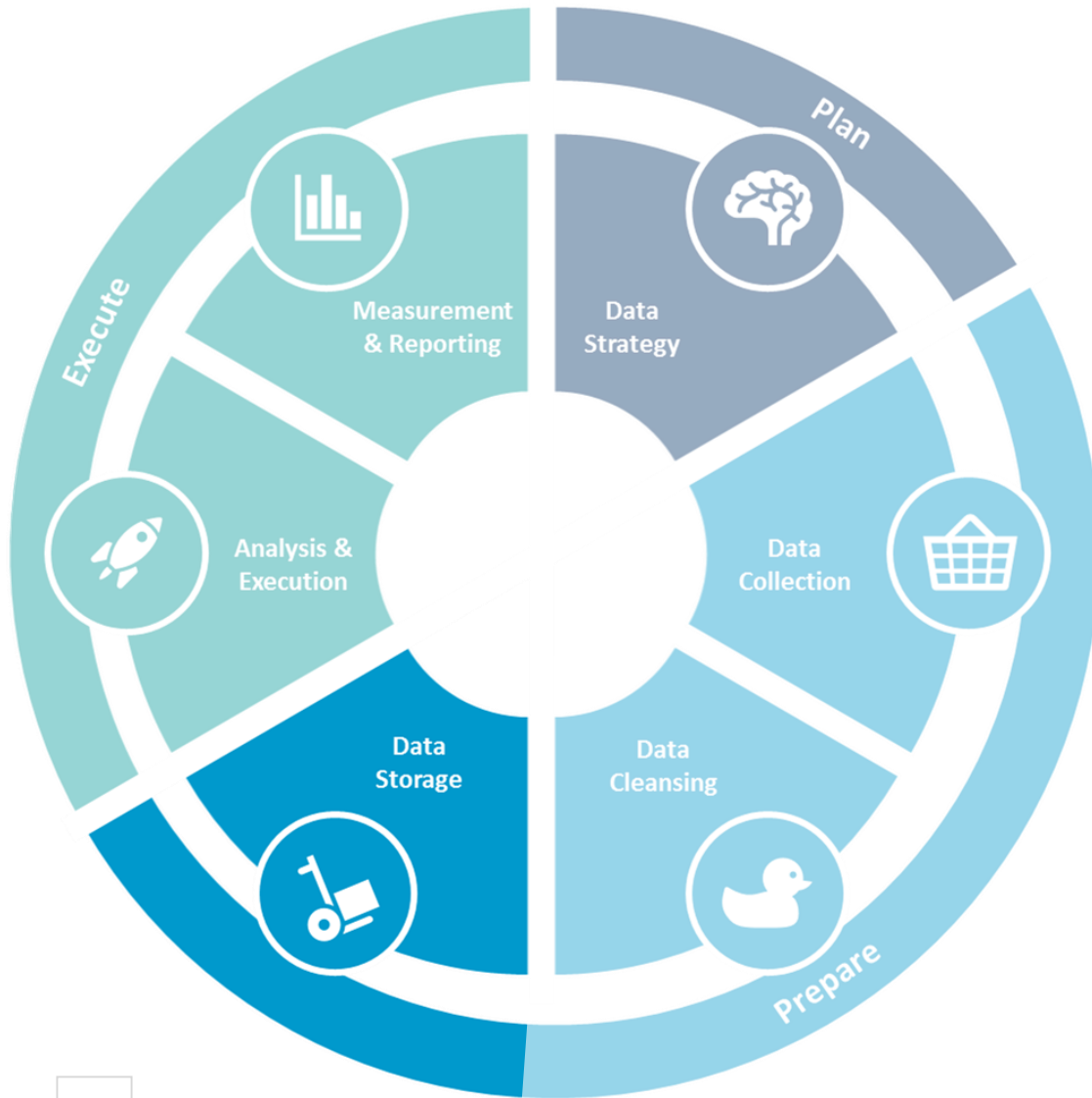
What is it?

Data Storage is the method in which you store your data in a safe and secure way. Some examples of data storage tools are:

- Paper to digital migration
- Desktop/laptop hard drive
- External hard drive
- Database
- Cloud storage
- Privacy considerations

Why is it Important?

Where and how you store your data is important when considering how quickly you need to retrieve it for reporting or analysis purposes, and ensuring the security and privacy of the data you are storing (especially donor personal information).

Analysis & Execution
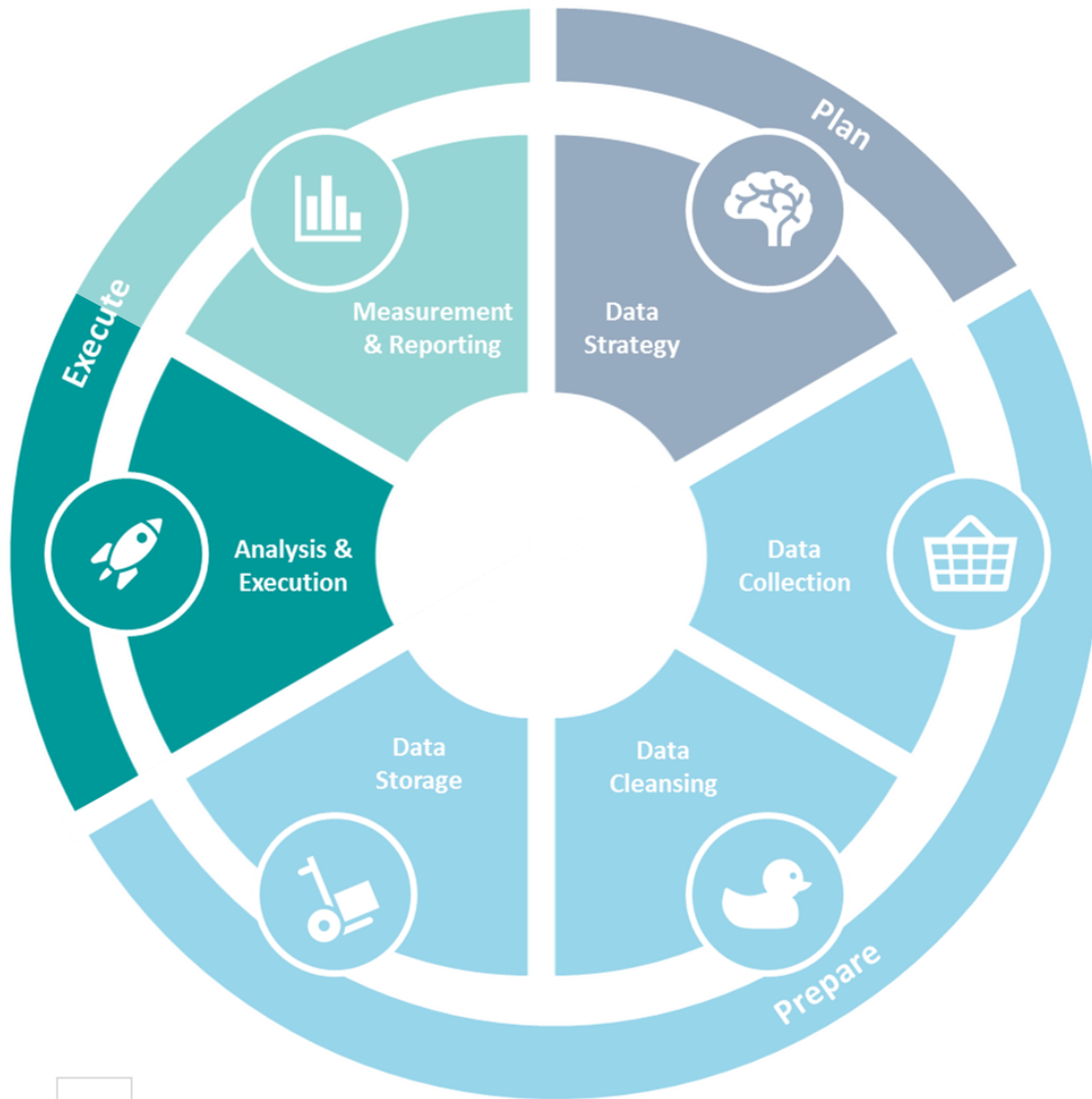
What is it?

Data Analysis is the process of mining, inspecting and manipulating the data with the goal of discovering useful insights and information. Some common questions that data analysis can answer:

- How many clients are served in day?
- What times of the year do we raise the most money?
- Which channels drive the most engagement?
- Who are my best donors?

Data Execution is the process in which you leverage your data and information to power various initiatives and decision-making.

- Impact strategy & planning
- Program development
- Forecasting
- Financial reporting & analysis
- Marketing initiatives (e.g. awareness building, fundraising timing)

Why is it important?

Data analysis is a critical function that enables you to glean key insights into what is driving your business, how to improve it and increase efficiency, effectiveness and performance. Applying data to decision-making and initiatives makes it more fact-based and objective, rather than gut-feel and subjective.

Measurement & Reporting
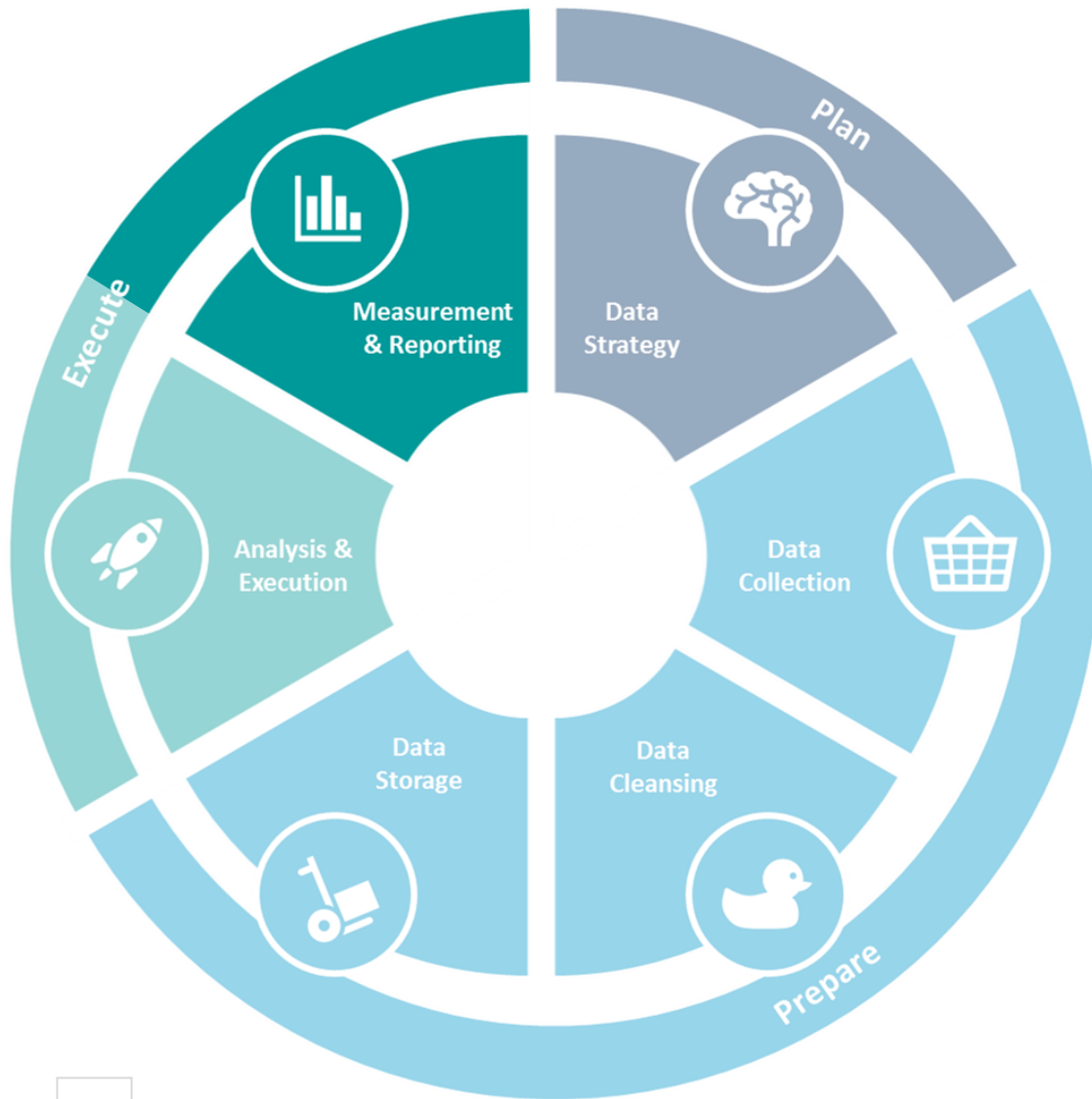
What is it?

Reporting is the process in which data is presented in such a way to provide key information and statistics on a business, and to track performance on key metrics.

- Internal vs. external reports
- Financial reports
- Impact reports
- Fundraising reports
- Campaign Performance Dashboards

Why is it important?

Reporting allows you to track key metrics and provides you with timely information to accurately assess the health of your business and to empower you to make decisions.

Where do you stand today? Some thought starters…

Data Strategy	Data Collection	Data Cleansing	Data Storage	Analysis & Execution	Measurement & Reporting
❑ What business problems can be addressed by data? What hypotheses should be tested? ❑ Who will be responsible? ❑ Do we have a policy on data management? ❑ What systems do we have now and what should we have for the future? ❑ Are we thinking about data needs for the future? ❑ How will this data strategy be implemented and who will manage it?	❑ Is the current data we're collecting relevant? ❑ Is our data outdated? ❑ Should we be gathering more data? ❑ Do we have a way of ensuring all personal data that is collected is secure?	❑ Are we sure the data is accurate? ❑ Do we have processes in place to standardize data? ❑ Is there a way to uniquely identify donors, clients, products, etc.?	❑ What system or database is being used to store the data? Is it secure enough for the type of data being stored? ❑ Who is accessing the data? How often? ❑ How often is the data being used?	❑ What are the hypotheses developed in the data strategy? How do we test them? ❑ Are we interpreting the data correctly? ❑ Do we have an analysis plan in place?	❑ What is our process for analyzing and reporting data? ❑ How easy is it to access data reports? ❑ What do your fundraising reports include today? What's missing? ❑ What outputs, outcomes and impact results are you tracking today? What's missing?
Plan	**Prepare**			**Execute**	

Data Heatmap – CanadaHelps

Plan

How would you rate your Data Strategy?

Significant investment over last 3 years. Still in early days of fully leveraging the data available to us. In terms of systems and processes, we are now entering the phase of incremental, ongoing improvements.

🔴 🟡 ⚪ ✔️(light green) 🟢

How would you rate your Data Collection?

As an online platform, we collect all relevant data with each user interaction and security is core. Today, we are exploring collection opportunities to advance the sector's understanding.

🔴 🟡 ⚪ 🟢(light green) ✔️(green)

Prepare

How would you rate your Data Cleansing?

The data that we need and is pertinent to our core operations is clean. We aspire to further standardize our data.

🔴 🟡 ⚪ ✔️(light green) 🟢

How would you rate your Data Storage?

We currently work with new & legacy storage systems. Once fully on new systems, we plan to provide charities and internal teams (e.g. Marketing) better access to the data that is stored and relevant to them.

🔴 🟡 ✔️(grey) 🟢(light green) 🟢

Execute

How would you rate your Analysis & Execution?

We now have significant advanced analytics tracking in place (e.g. scorecard metrics reports, life time value analysis, churn analysis). We are now embarking on advanced e-commerce testing.

🔴 🟡 ⚪ ✔️(light green) 🟢

How would you rate your Measurement & Reporting?

Significant investment over last 3 years. Still in early days of fully leveraging the data available to us. In terms of systems and processes, we are now entering the phase of incremental, ongoing improvements.

🔴 🟡 ⚪ ✔️(light green) 🟢

Over to you!

Please find the "Data 101 Exercise" in your Welcome kit.

Data Process.
Understanding where you are and how to improve

Data Process.

The Roadmap to Becoming a Data-Driven Charity
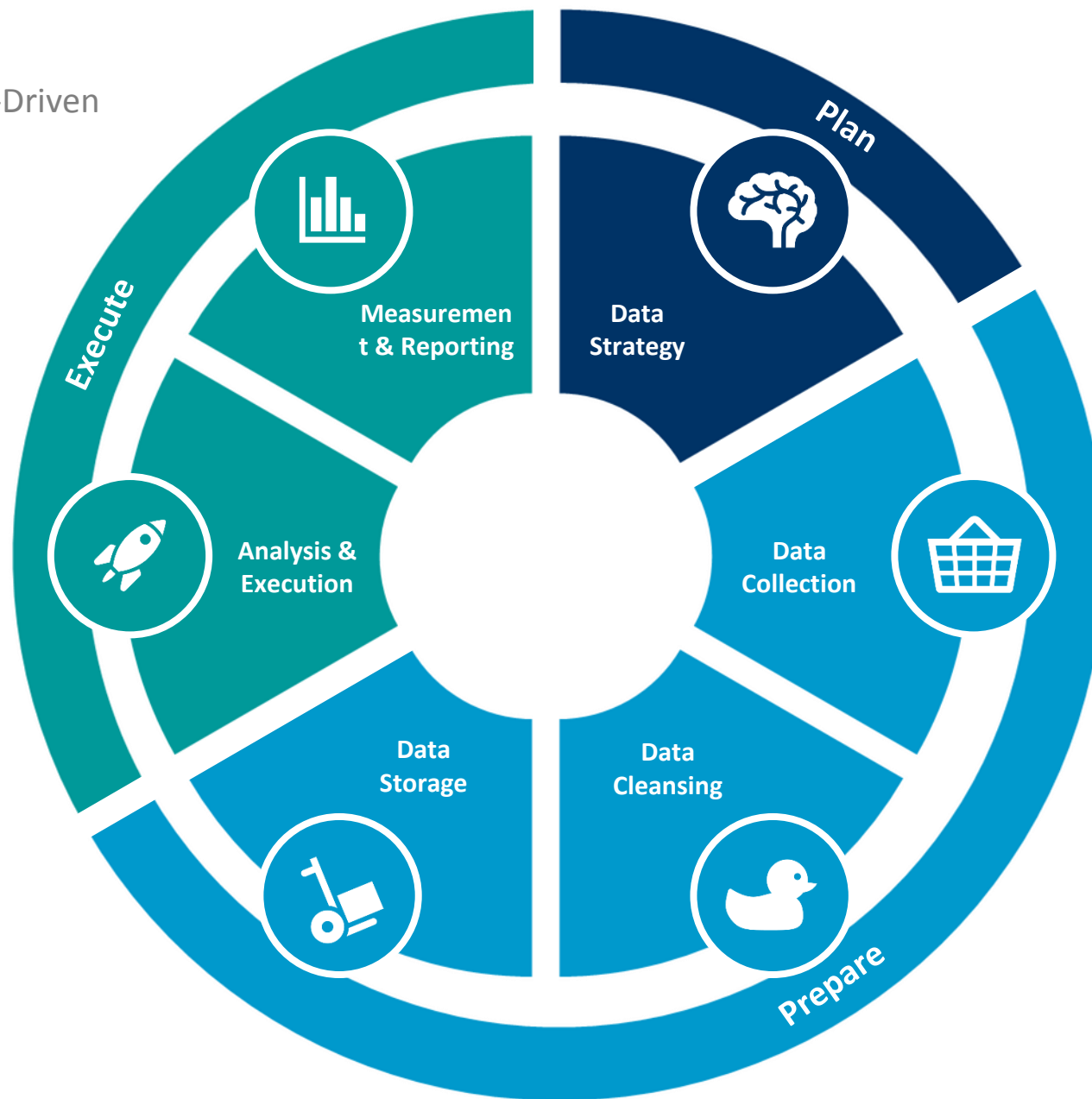
Data Strategy

Data Strategy

Goal Setting

Data Process

PLAN

Data Strategy

Before you start to prepare your data and execute analysis, you need to plan your data strategy. Every organization is different, and it's important to choose what is truly important to your non-profit. A sound data strategy should be able to support your organization's overall strategy, provide the infrastructure and mechanisms to measure performance, and provide input and insight into the future of your organization.

Data Policy

Implementation

Hypothesis & Measurement

Who will do this?

Data Architecture

Plan for the Future

Setting SMART Goals

Specific

What are your specific goals? Clearly define the goals your non-profit organization wants to accomplish both on a short-term and long-term basis.

Measurable

Just as clearly as you defined your goals, develop a standard for clearly measuring them.

Attainable

Are your goals for your organization attainable? For example, if your organization has 500 supporters, getting to 150,000 by the end of the year may not be attainable.

Relevant

Just as important as it is for you to identify attainable goals, you should set goals that are relevant to your organization. Choose those that make sense for you.

Time-Bound

When do you want to accomplish your goals? Set a deadline so that you're accomplishing your goals within a set timeframe.

Data Process.

Plan

Execute

Prepare

Measurement & Reporting

Data Strategy

Analysis & Execution

Data Collection

Data Storage

Data Cleansing

Where am I today?

Where do I want to be tomorrow?

What are my short and long term KPIs?

Data Collection

Collect data that matters

Create a data collection plan

Considerations

PREPARE

"If you can't secure it... don't collect it."

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Collect data that matters

While collecting the data for your constituent profiles, the more the better. The more data you have on your supporters, the better you can appeal and steward them.

Social Impact data

The data points you will want to collect depend on your Social Impact goal. Here are some examples of things you may want to track:

Example Goal: *Ensure that all Canadians live with the dignity and comfort of a furnished home*

☐ Output: # of households provided with required furniture in their homes

☐ Outcome: Client becomes more socially connected; has a space to invite family and friends to connect. This could be measured through survey follow-up.

☐ Impact: % of clients who do not re-experience homelessness within 5 years vs. baseline.

Fundraising data

Some data points you may want to consider collecting and tracking include:

Data Toolbox
You can find the specific data collection requirements of the CRA for tax receipting purposes here.

Contact Info
☐ Address
☐ Phone number
☐ Email address
☐ Social media profiles

Demographics:
☐ Age
☐ Gender
☐ Marital status
☐ Household income
☐ Interests
☐ Occupation

Giving
☐ Cost of acquisition
☐ Pledges
☐ Payment method
☐ Gift amount
☐ Frequency of giving
☐ Recency of giving
☐ Patterns in giving
☐ # of years as a donor
☐ Upgrades
☐ Downgrades

Interactions
☐ Soft credits
☐ Volunteer activity
☐ Event attendance
☐ Email open rates
☐ Email clicks
☐ Website visits
☐ Direct mail response rate
☐ Follower on social media
☐ Newsletter sign-up

Create a data collection plan

Valid and reliable data is the backbone of program analysis and operation. Knowing that you know the data you want to collect, it's important to create a plan to detail how you will go about this.

Creating a data collection plan
- ❏ Who is responsible?
- ❏ What are the data types you are collecting?
- ❏ What is the sample size or frequency?
- ❏ Data and time
- ❏ Recording method
- ❏ Questions to be answered

Data Toolbox
A data collection plan is available in the collection of appended material, or "data toolbox" for you to review and complete with your team. This should serve as a master document across all areas of the organization, and the more people that are able to have input, the more complete the plan will be.

Determined in data strategy stage			What		Why	Who	How		Other
Category	What data will you collect?	What is the function of this data?	Data type	Sample size or frequency	Questions to be answered	Responsible	Recording method	Collection method	Comments

Building and maintaining a database

While you may not have all data on one donor at first, you can collect it over time. The more data you collect on one individual, the more effectively you can communicate to them, impact their behaviour, and reach your fundraising and impact objectives.

	Demographics	Psychographics	Engagement	Business Info	Analytics	Program Response
	Age ✓	Daily Activities	Frequency & Recency? ✓	Cost of Acquisition	Supporter Segment ✓	Email Clicks/Opens ✓
S12345	Gender ✓	Political Affiliation	Events? ✓	Patterns in Giving	Lifetime Value	Response Rate
Mike123@gmail.com	Household Income	Lifestyle & Interests	Avg. Gift Size	# of Years Donor ✓	Forecasting	Website Visits ✓
Mike Gallagher	Marital Status	Relationship to Cause ✓	Social Media	Upgrades	Donor RFM Modelling	DM Response Rate
	Education Level	Motivators	Volunteer?	Downgrades	Churn Analysis	Newsletter Sign-up
	…	…	…	…	…	…

What to consider when collecting data

Data needs to meet a certain set of quality criteria. Data quality is a perception or an assessment that data is fit for its intended uses in operations, decision-making, and planning.

Data Toolbox
You can access the Canadian standard for privacy (PIPDA) here.

Validity

Is the data valid?

The degree to which the measures conform to defined business rules or constraints

Accuracy

How accurate is the data?

The degree of conformity of a measure to a standard or a true value

Completeness

How complete is the data?

The degree to which all measures are known

Consistency

Is data consistent across different sources?

The degree to which a set of measures are equivalent across systems

Uniformity

Is the data uniform across systems?

The degree to which a set of measures are specified using the same units of measure in all systems

Privacy

Data Cleansing

Why cleanse?   Stages   Challenges

PREPARE

"He who would search for pearls must dive below."

John Dryden

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Why do we need to cleanse?

We cleanse our data to remove unwanted, "dirty" data. Data cleansing is the act of detecting and correcting (or removing) corrupt or inaccurate records from a record set, table, or database. In more complex operations, data cleansing can be preformed by computer programs.
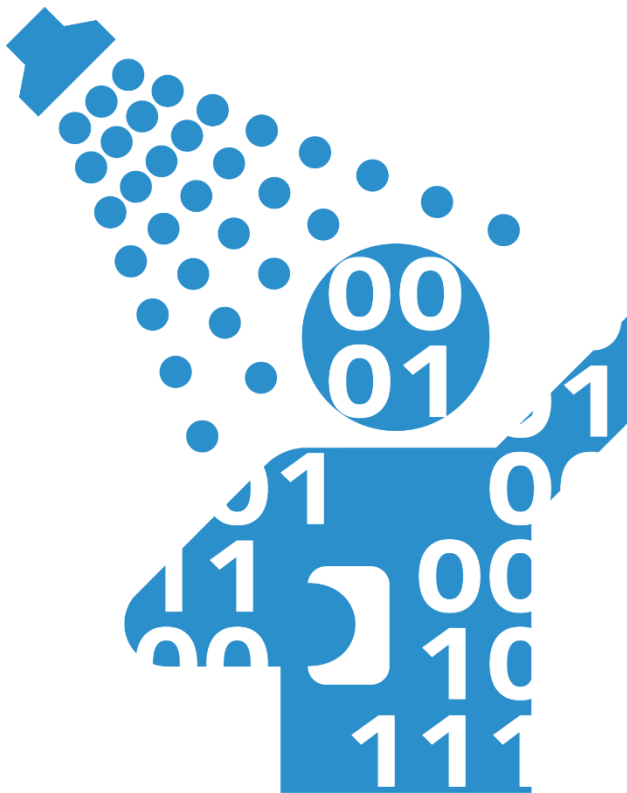
Unwanted data:
- Dummy values
- Absence of data
- Multipurpose fields
- Cryptic data
- Contradicting data
- Inappropriate use of address lines
- Violation of business rules
- Reused primary keys
- Non-unique identifiers
- Data integration problems

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Email: Tates@gmail.com

Note: You and your team will determine the format that all data will need to meet in the data strategy stage.

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However, the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.

01

Parsing
Locate and identify individual data elements in the source files and then isolate these data elements in the target files

02

Correcting
Corrects parsed individual data components using data algorithms and secondary data sources

03

Standardizing
Transforming data into its preferred format

04

Matching
Searching and matching records based on predefined business rules to eliminate duplications

05

Consolidating
Analyzing and identifying relationships between matched records and consolidating/merging them into one representation

Data Toolbox
If you are using excel, find their support page on data cleansing here.

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However, the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.

01 **02** **03** **04** **05**

Parsing
Locate and identify individual data elements in the source files and then isolate these data elements in the target files

Input Data from Source File
Beth Christine Parker, SLS MGR
Regional Port Authority
Federal Building
12800 Lake Calumet
Hedgewisch, IL

Parsed Data in Target File
First Name:	Beth
Middle Name:	Christine
Last Name:	Parker
Title:	SLS MGR
Firm:	Regional Port Authority
Location:	Federal Building
Number:	12800
Street:	Lake Calumet
City:	Hedgewisch
State:	IL

49

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However, the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.

01	02	03	04	05

Correcting
Corrects parsed individual data components using data algorithms and secondary data sources

Parsed Data	
First Name:	Beth
Middle Name:	Christine
Last Name:	Parker
Title:	SLS MGR
Firm:	Regional Port Authority
Location:	Federal Building
Number:	12800
Street:	Lake Calumet
City:	Hedgewisch
State:	IL

Corrected Data	
First Name:	Beth
Middle Name:	Christine
Last Name:	Parker
Title:	SLS MGR
Firm:	Regional Port Authority
Location:	Federal Building
Number:	12800
Street:	South Butler Drive
City:	Chicago
State:	IL
Zip:	60633
Zip+Four:	2398

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.

| 01 | 02 | 03 | 04 | 05 |

Standardizing
Transforming data into its preferred format

```
Corrected Data
First Name:     Beth
Middle Name:    Christine
Last Name:      Parker
Title:          SLS MGR
Firm:           Regional Port Authority
Location:       Federal Building
Number:         12800
Street:         South Butler Drive
City:           Chicago
State:          IL
Zip:            60633
Zip+Four:       2398
```

```
Corrected Data
Pre-name:       Ms.
First Name:     Beth
1st Name Match
 Standards:     Elizabeth, Bethany, Bethel
Middle Name:    Christine
Last Name:      Parker
Title:          Sales Mgr.
Firm:           Regional Port Authority
Location:       Federal Building
Number:         12800
Street:         S. Butler Dr.
City:           Chicago
State:          IL
Zip:            60633
Zip+Four:       2398
```

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.

01 — 02 — 03 — **04** — 05

Matching
Searching and matching records based on predefined business rules to eliminate duplications

Corrected Data (Data Source #1)
Pre-name:	Ms.
First Name:	Beth
1st Name Match	
Standards:	Elizabeth, Bethany, Bethel
Middle Name:	Christine
Last Name:	Parker
Title:	Sales Mgr.
Firm:	Regional Port Authority
Location:	Federal Building
Number:	12800
Street:	S. Butler Dr.
City:	Chicago
State:	IL
Zip:	60633
Zip+Four:	2398

Corrected Data (Data Source #2)
Pre-name:	Ms.
First Name:	Elizabeth
1st Name Match	
Standards:	Beth, Bethany, Bethel
Middle Name:	Christine
Last Name:	Parker-Lewis
Title:	
Firm:	Regional Port Authority
Location:	Federal Building
Number:	12800
Street:	S. Butler Dr., Suite 2
City:	Chicago
State:	IL
Zip:	60633
Zip+Four:	2398
Phone:	708-555-1234
Fax:	708-555-5678

Steps in Data Cleansing

We cleanse our data to remove unwanted, "dirty" data. However the goal of data cleansing is not just to clean the data but also to bring consistency to different sets of data that have been merged from separate databases. In more complex operations, data cleansing can be preformed by computer programs.
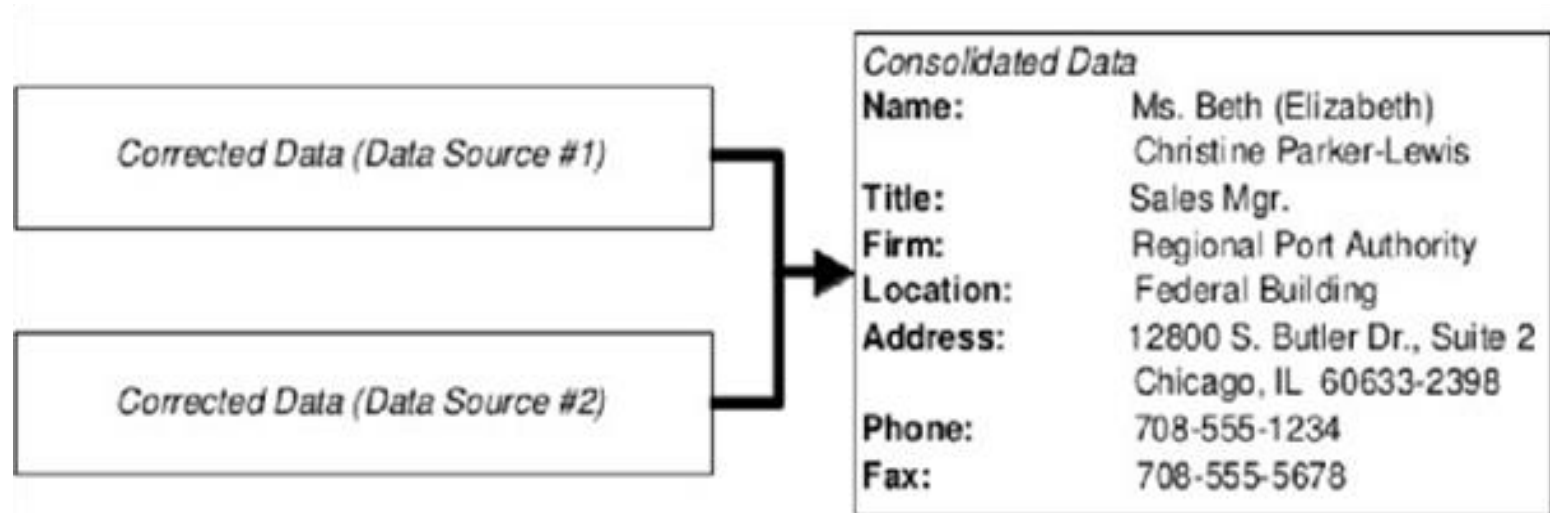
01 — 02 — 03 — 04 — 05

Consolidating
Analyzing and identifying relationships between matched records and consolidating/merging them into one representation

Corrected Data (Data Source #1)

Corrected Data (Data Source #2)

Consolidated Data
Name:	Ms. Beth (Elizabeth) Christine Parker-Lewis
Title:	Sales Mgr.
Firm:	Regional Port Authority
Location:	Federal Building
Address:	12800 S. Butler Dr., Suite 2 Chicago, IL 60633-2398
Phone:	708-555-1234
Fax:	708-555-5678

Note
Use a Unique Identifier (e.g. name, email, number) for each individual to ensure that you are properly consolidating your data

Common Challenges

It is common to run into a few speedbumps along the way. Here are some common challenges to be mindful of:

Challenges

Solutions

Error correction and loss of information
The most challenging problem within data cleansing remains the correction of values to remove duplicates and invalid entries. You must be careful to ensure that when you are deleting information, you are not losing valuable information.

Duplicate records
To get around this problem, it's best practice to save a raw data set in addition to the clean file that you're working on.

Maintenance of cleansed data
Data cleansing is an expensive and time-consuming process. So after having performed data cleansing and achieving a data collection free of errors, one would want to avoid the re-cleansing of data in its entirety after some values in data collection change. The process should only be repeated on values that have changed.

Data-cleansing process
Keep a record of data that is new that needs cleansing before it is added to the cleansed data file.

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Data Storage
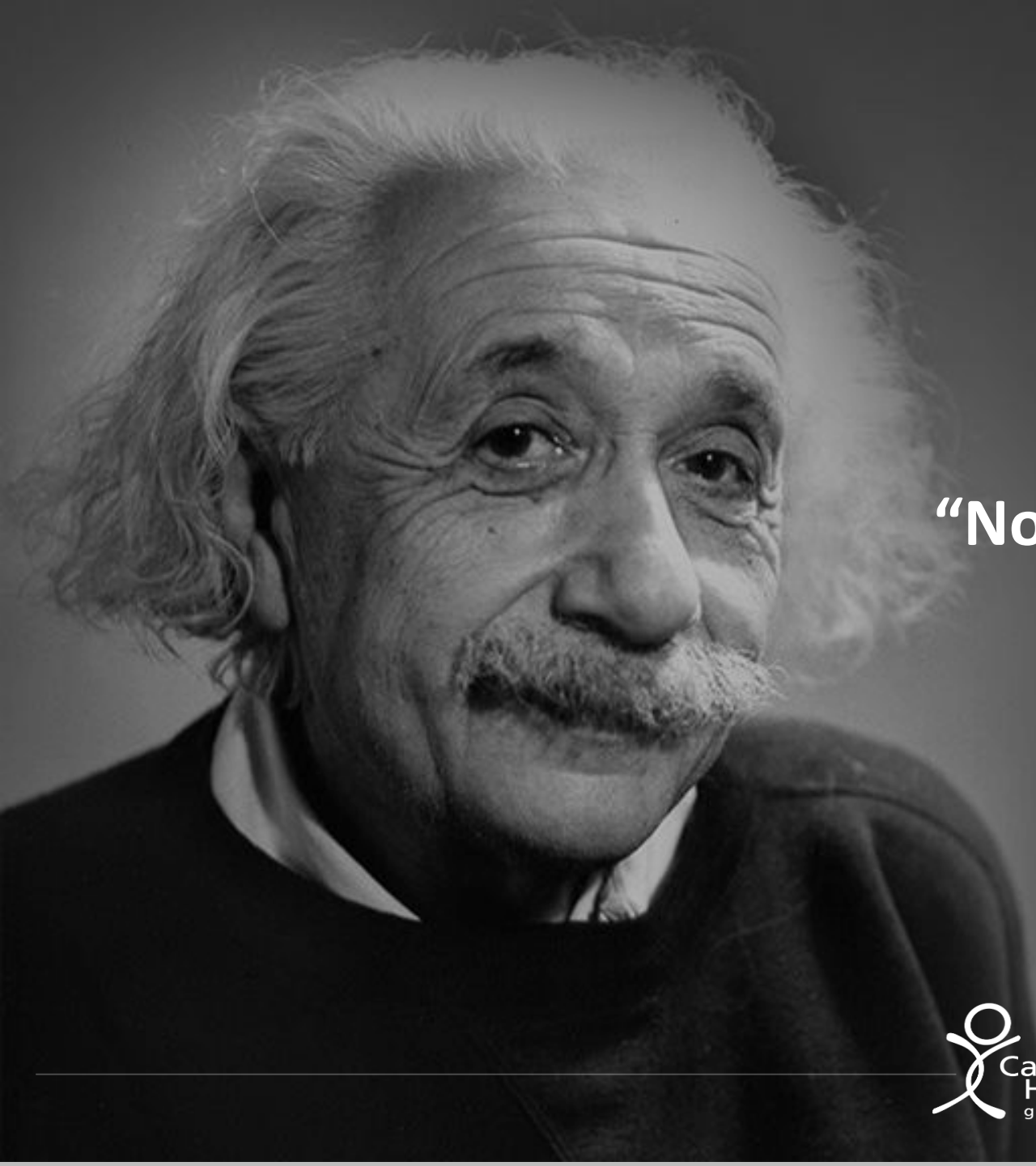
Finding a data management solution

Data management tools

Maintaining a data entry checklist

PREPARE

"Not everything that can be counted counts, and not everything that counts can be counted."

Albert Einstein, Physicist

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Finding a data management solution

In order to determine what is the right data storage solution for you, you need to take into account the following considerations. Data storage does not need to be complicated but it does need to meet the needs of your organization.

Considerations

- Your capacity (resources, financial)
- Size of data

- Frequency of data
- Level and type of access

- Velocity of data
- Privacy and security (e.g. encryption)

Cloud Storage
Data is hosted in a cloud environment by a hosting company.

Physical Database
Company servers, physical servers that you own.

Local Storage
Data stored on your personal desktop, laptop, or external hard drive/storage device.
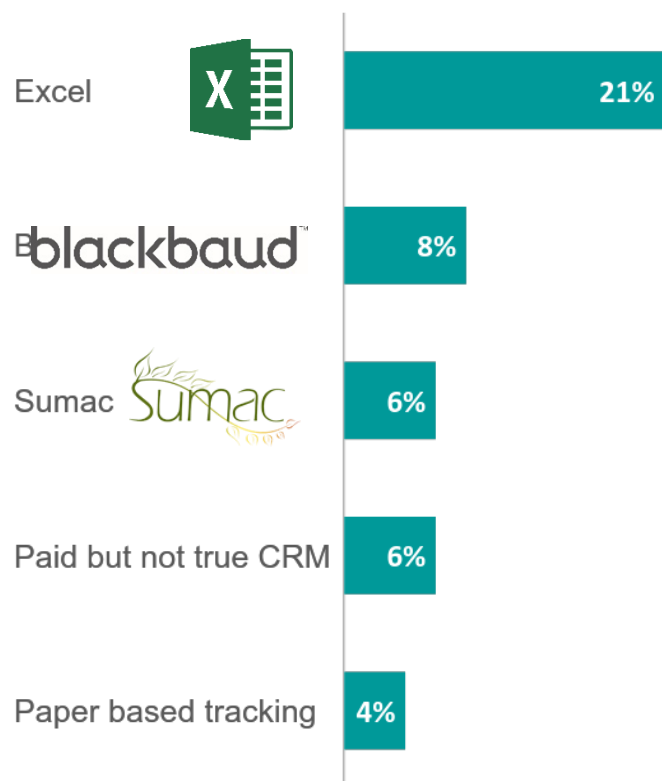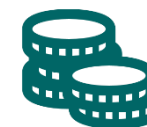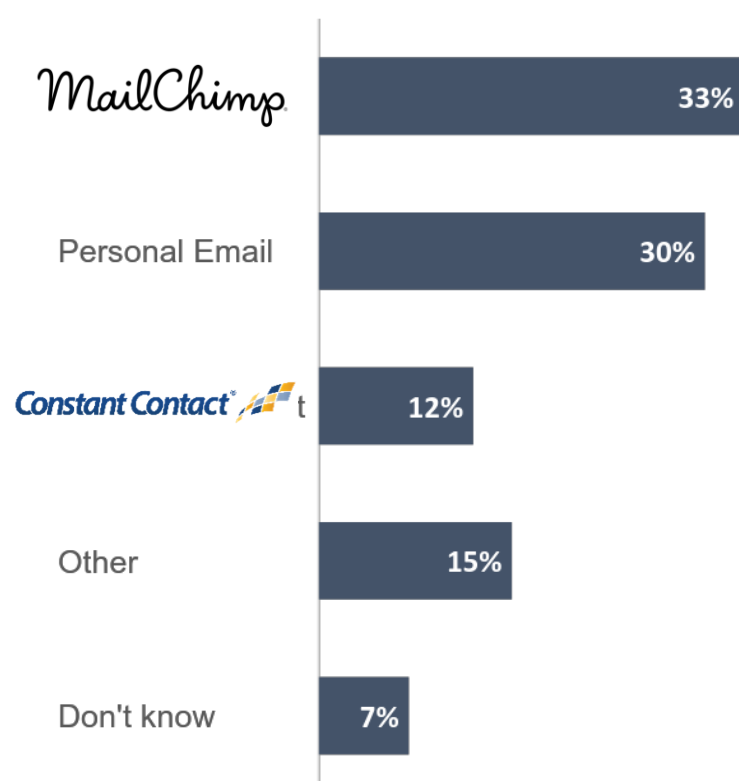
The results are in!

CanadaHelps survey results reveal what data management looks like to you

CRM Platforms Used

Platform	%
Excel	21%
blackbaud	8%
Sumac	6%
Paid but not true CRM	6%
Paper based tracking	4%

Email Marketing Platforms Used

Platform	%
MailChimp	33%
Personal Email	30%
Constant Contact	12%
Other	15%
Don't know	7%

Financial/Accounting System Used

Platform	%
QuickBooks	40%
sage	20%
Other	22%
Don't know	15%

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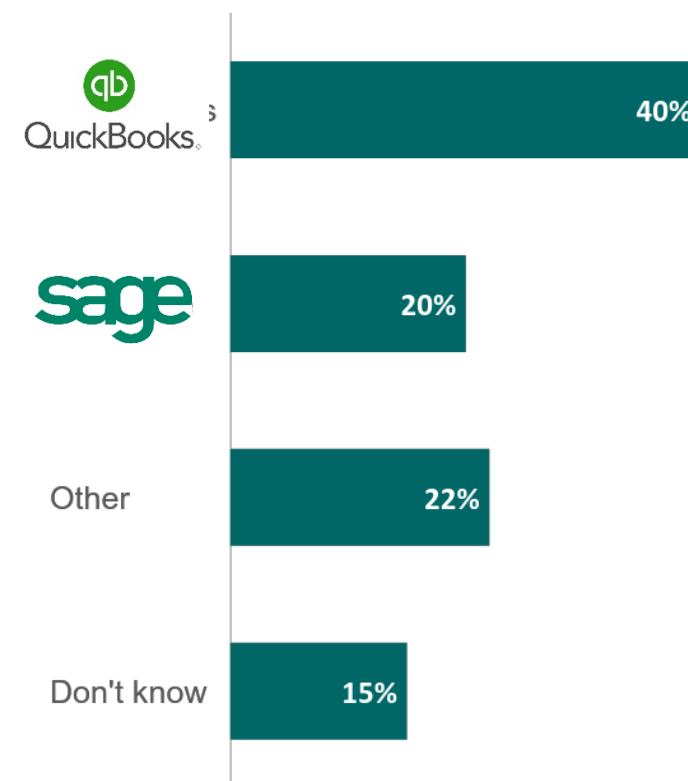
Data management tools

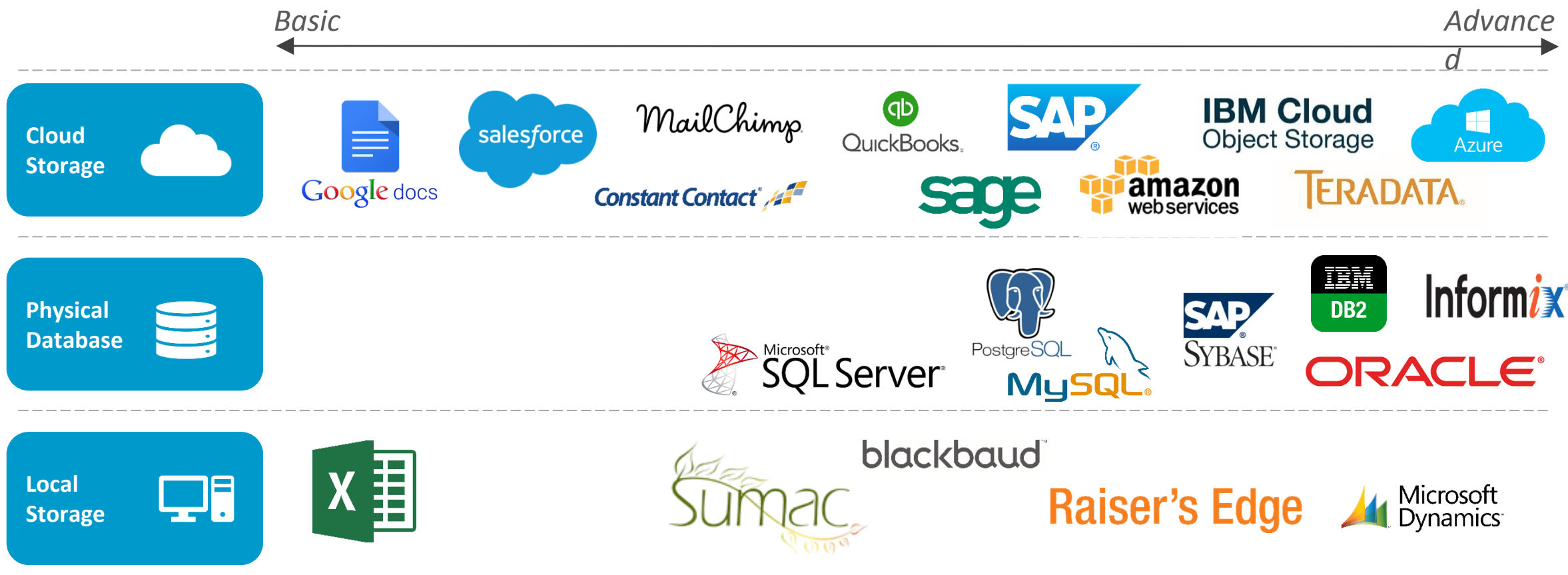There are a variety of data management tools to choose from depending on your current and future data needs. The key is to find the right sized tool for your business and to migrate when there is a need. Some tools perform multiple functions. Conduct an audit to determine the right tool for your needs.

Basic ← → *Advanced*

Cloud Storage
- Google docs
- salesforce
- MailChimp
- Constant Contact
- QuickBooks
- sage
- SAP
- amazon web services
- IBM Cloud Object Storage
- TERADATA
- Azure

Physical Database
- Microsoft SQL Server
- PostgreSQL
- MySQL
- SAP SYBASE
- IBM DB2
- ORACLE
- Informix

Local Storage
- X (Excel)
- Sumac
- blackbaud
- Raiser's Edge
- Microsoft Dynamics

Prepare: Wrap-up

TOP 10 TIPS

1. Every contact is a data capture opportunity
2. Make it easy for end users to give you information
3. Incentivize your end user to part with their details
4. Collect data in-line with private regulations
5. Decide what data you need to prioritize
6. Don't ask everything at once – build it over time
7. Set targets for breadth, depth and quality
8. Collect data in standardized format
9. Streamline the data from point of capture to storage
10. If you can't collect it, you can buy it

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Developing a Data management checklist

Because organizations evolve as they grow, it's important to re-examine your processes every once in a while (at least annually). You may have an obsolete procedure, or find that there's a slightly better way to do something. Don't be afraid to change if it increases your productivity!

Daily/Weekly
- ❑ Enter new data (as needed).
- ❑ Update existing data (as needed): don't wait to update data if you get a change of address, name, marital status, etc.
- ❑ Back up your data: Some database programs do this automatically, some do not.

Monthly
- ❑ Identify and merge any duplicate records
- ❑ Run reports to keep team members updated
- ❑ Review fund/campaign activity
- ❑ Review rolling LYBUNT / SYBUNT
- ❑ Review overdue pledges
- ❑ Review data against your goals

Every 3-6 months
- ❑ Invest in data services, if necessary. Consider appending phone number, email, birth data, name, as well as deceased suppressed processing.
- ❑ Revisit your strategic plan. Don't wait until the end of the year to determine if you're hitting your goals.

Every 12 months
- ❑ Run a NCOA. An estimated 14% of Canadians move every year—don't miss out!
- ❑ Purge your donor list. Remove the names of people who have not donated to your cause in 2-3 years, except former volunteers and board members.
- ❑ Develop an in-depth report for your donors to show them how their donations are making an impact.
- ❑ Check businesses on your donor list to see if contact information needs to be updated.
- ❑ Review and update the organization's data management policy.

Maintaining a data management checklist

Many donor databases fail to reach their true potential simply because there is no defined process for data entry. Documenting and sticking to one universal process will ensure that all data is formatted consistently and will protect your impact and fundraising efforts in the event of staff turnover.

An effective data management strategy requires regular maintenance. If you're not setting and accomplishing tasks on a regular basis, it's unlikely that you will be able to generate the reports that will dictate your future strategies. Use this checklist as a reminder of the exercises you should be doing regularly. Keep at it and you'll find that they will become second nature.

❑ **Store your data in one place.**
   Avoid multiple spreadsheets or multiple programs (e.g. accounting, email, donor database).

❑ **Develop standard format and naming conventions for data entry.**
   Ex. Will we spell out Street or just use St.?

❑ **Develop standard guidelines for data entry.**
   Ex. Will we run a search prior to data entry to avoid duplicates?
   Ex. Only Sally and Jim will enter data (having more than one data entry person is a good idea, but having too many can cause problems).

❑ **Have a plan for exceptions.**
   (There will always be some.)

❑ **Define optional custom fields**
   and adhere to them. Delete/merge any duplicate or closely related fields.

❑ **Train your staff on the standards you have created.**

❑ **Schedule regularly occurring reviews of data and procedures.**
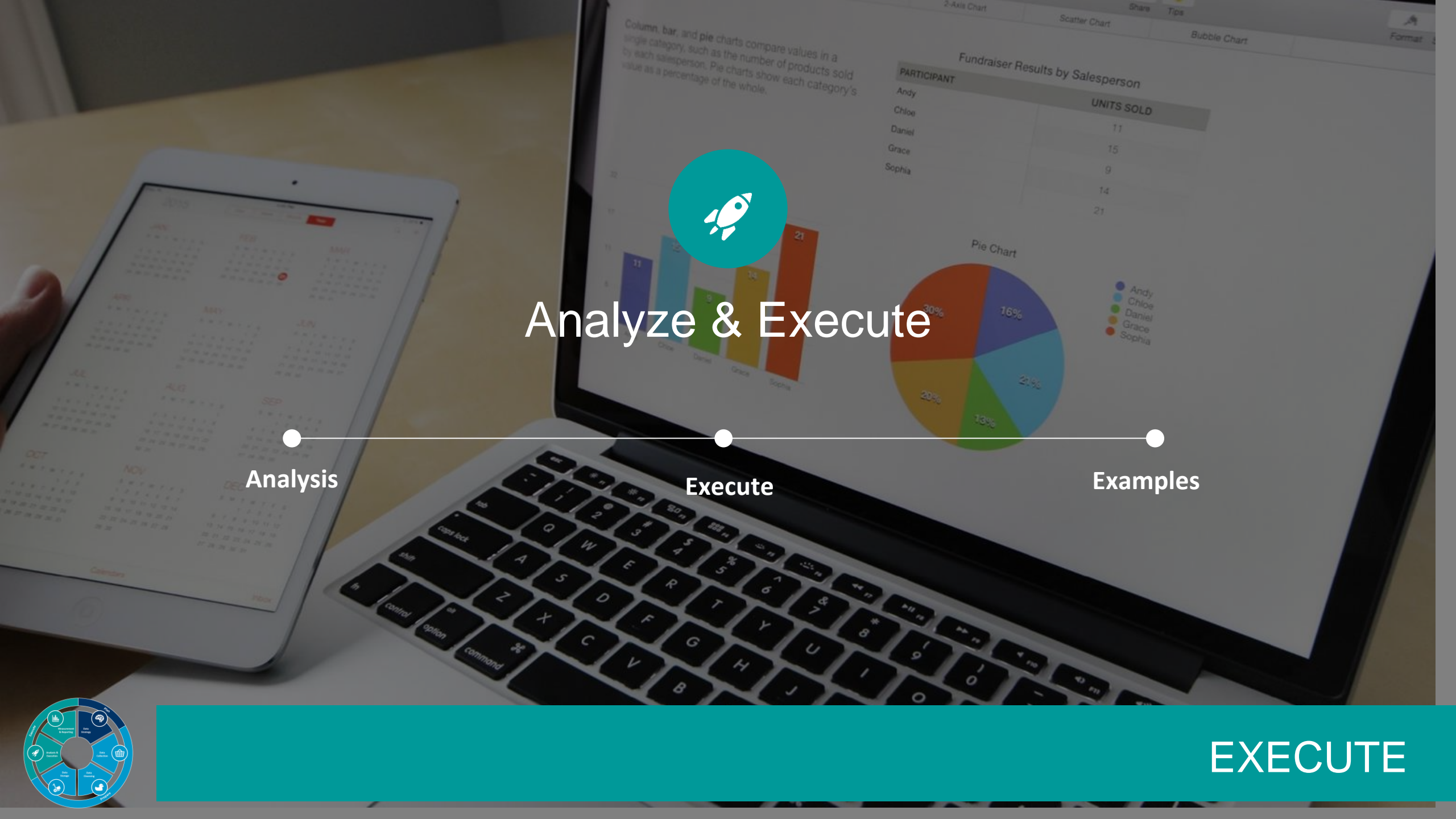
Analyze & Execute

Analysis — Execute — Examples

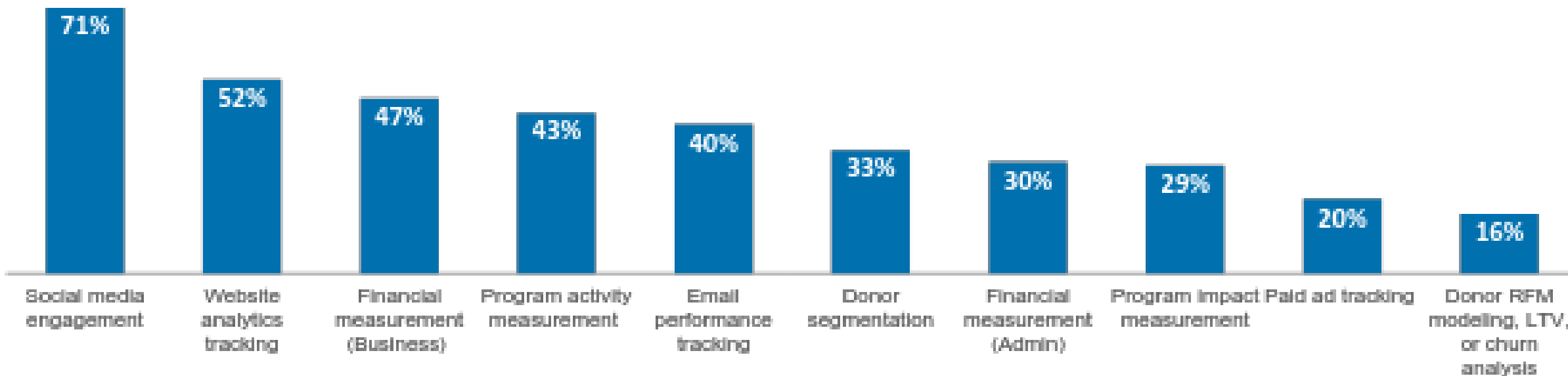"The value of an idea lies in the using of it."

Thomas A. Edison

CanadaHelps.org
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The results are in!

Here are the types of reporting and analysis that you, and organizations like you, perform.

What types of reporting or analysis has your organization done in the last 12 months?

Social media engagement	Website analytics tracking	Financial measurement (Business)	Program activity measurement	Email performance tracking	Donor segmentation	Financial measurement (Admin)	Program impact measurement	Paid ad tracking	Donor RFM modeling, LTV, or churn analysis
71%	52%	47%	43%	40%	33%	30%	29%	20%	16%

Impact data applied:
CanadaHelps Charity Education – Monthly Program

Background

Our impact objective is to grow giving in Canada to help ensure that all charities, regardless of size have access to the online fundraising tools and skills they need to fund their work.

Monthly donors give 2X more than one-time donors, are more easily & cost-effectively retained, and offering predictable funding allow charities to optimize spending.

Hypothesis

Large charities invest heavily in maintaining monthly donor programs. Few small charities invest sufficiently in growing monthly donors. With training and education, small charities can grow their funding.

Analysis

We worked with a sector-leading consultant to create a white paper & webinar for charities sharing approachable steps based on proven best practices for launching & managing an effective monthly donor program.

Test & Measure - Results

OUTPUTS:
- **749** charities joined or viewed the webinar and **1,484** charities downloaded the white paper.

OUTCOMES:
- Charity-driven monthly donations grew **41%** year-over-year.

IMPACT:
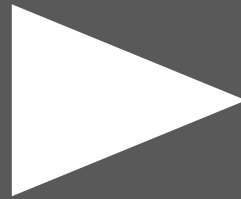- **Nearly 1,000 more charities now have a more predictable, sustainable, growing revenue.**

Growing Your Monthly Donors

CanadaHelps.org

Impact Example

Bringing Data to Life

Video to be inserted (not included for size)

Analysis in Action
CanadaHelps Direct-to-Donor Monthly Program

Background

Monthly donations on the CanadaHelps Direct-to-Donor site are growing at roughly the same rate as one-time donations (20% year-over-year).

Hypothesis

Applying the best practices shared with our charities to our Direct-to-Donor program, we can grow the number of monthly donors.

Analysis

How does a monthly donor compare to a 1x donor?

How does this vary based on frequency and value of gifts? Type of charity supported?

How many gifts to the same charity before they become a monthly donor?

Test & Measure

Using analysis insights we will conduct extensive program testing to identify:

- **Best time to make a monthly donation ask,** e.g. after X gifts to the same charity? X gifts through CanadaHelps? X gifts valued at $Y or more?

- **Optimal suggested monthly donation ask amounts,** in consideration of the donor's past giving.

- **Most effective message,** e.g. whether suggesting a gift to a specific charity, all charities they've given to, etc.
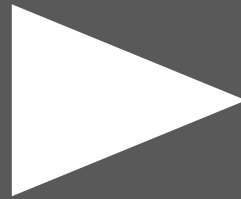
Growing Your Monthly Donors

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Fundraising Example

Bringing Data to Life

Video to be inserted (not included for size)

Reporting

Survey Results

Examples

EXECUTE

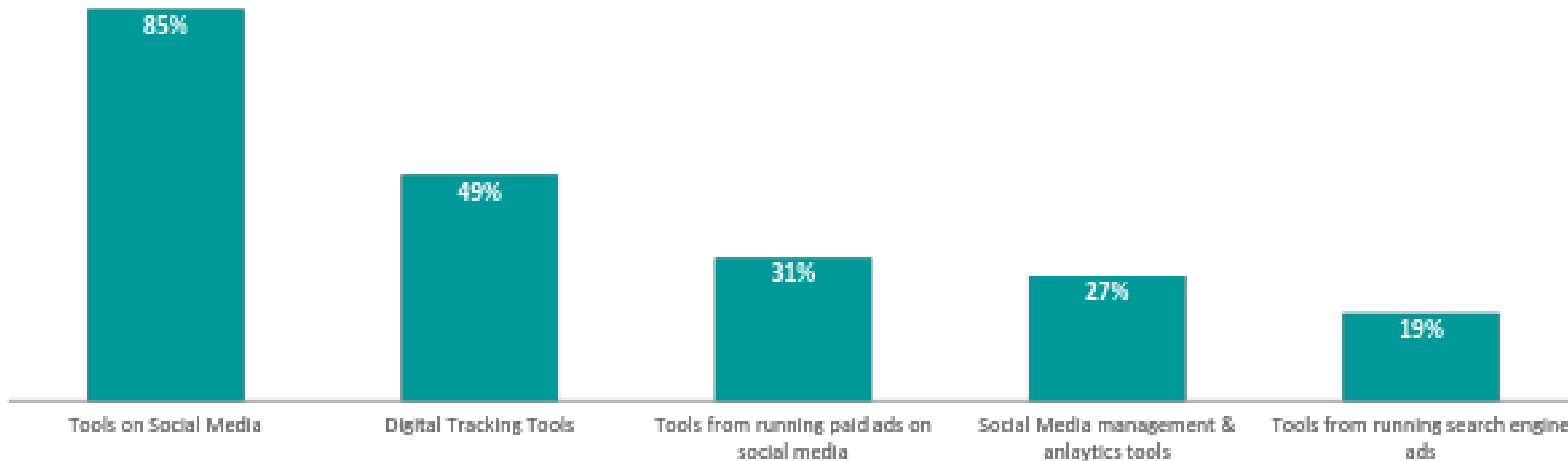"Numbers have an important story to tell. They rely on you to give them a clear and convincing voice."

Stephen Few

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The results are in!

CanadaHelps survey results reveal what data management looks like to you

What Digital Marketing Insights Tools do you use?

85%

49%

31%

27%

19%

Tools on Social Media

Digital Tracking Tools

Tools from running paid ads on social media

Social Media management & anlaytics tools

Tools from running search engine ads

Example: Google Analytics
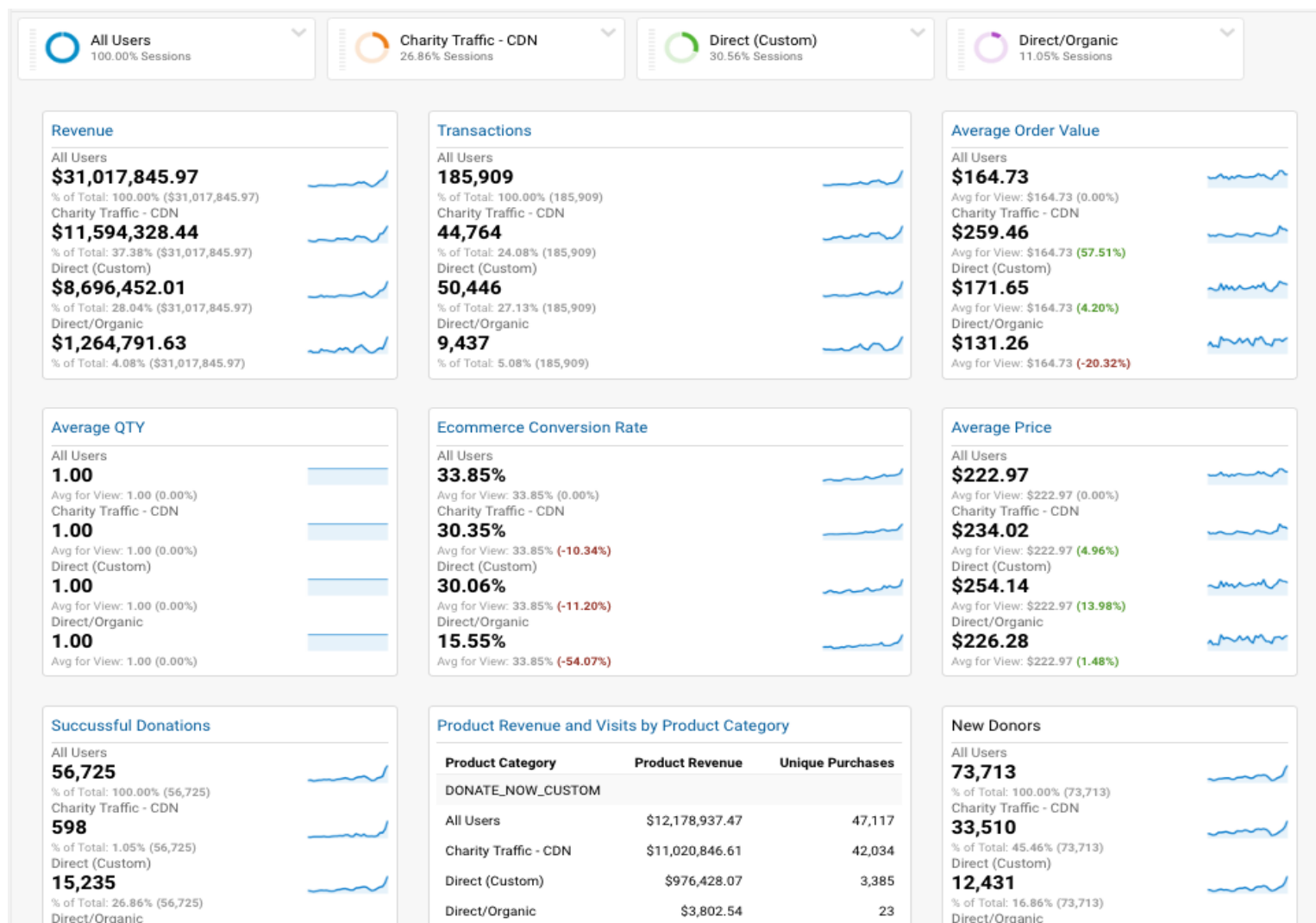
Free website analytics:
- Where is your traffic coming from?
- What is the demographic make-up?
- What technology are they using?
- What are they doing on your site?

Customizations to meet our needs:
- **Segments:** Used extensively for insight by product traffic.

- **Dashboards:** New vs. Repeat donors, eCommerce conversion, Donor email, Charity email, Social engagement, etc.

- **Goals and Goal Visualization:** Donation paths, Charity registration, White paper download, Email signup, etc.

- **Google Experiments:** Investigating move from Optimizely Google Experiments for A/B testing website pages.

Example: Sprout Social
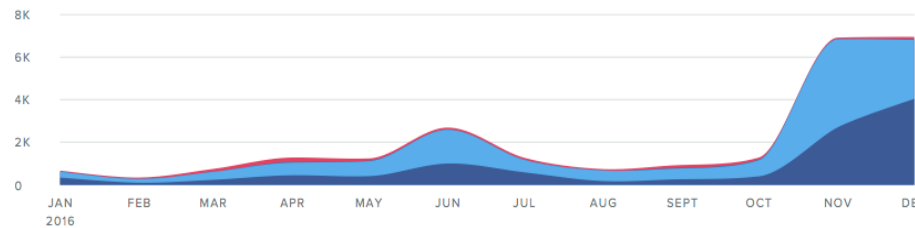

Audience Growth

AUDIENCE GROWTH, BY MONTH
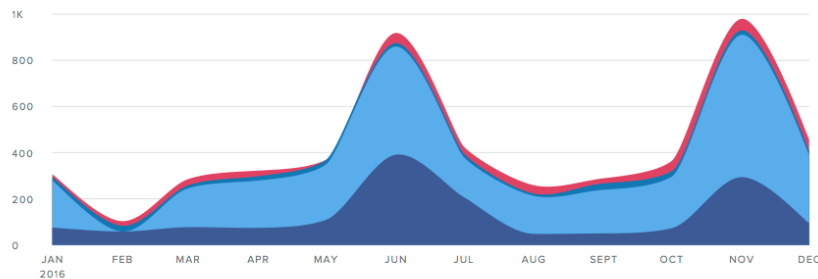
■ FACEBOOK ■ TWITTER ■ LINKEDIN ■ INSTAGRAM

AUDIENCE GROWTH METRICS	TOTALS	CHANGE
Total Fans	**23,339**	▲ **29.1%**
New Facebook Fans	1,549	▲ 203.1%
New Twitter Followers	-11,606	▼ 749.5%
New Instagram Followers	-126	▼ 59.5%
New LinkedIn Followers	224	▼ 28.2%
Total Fans Gained	-9,959	▼ 493.5%

Total fans increased by

▲ **29.1%**

since previous date range

Engagements

ENGAGEMENTS PER MONTH

■ FACEBOOK ■ TWITTER ■ LINKEDIN ■ INSTAGRAM

ENGAGEMENT METRICS	TOTALS	CHANGE
Facebook Engagements	10,637	▲ 234.7%
Twitter Engagements	12,988	▲ 212.8%
Instagram Engagements	1,246	▲ 154.3%
LinkedIn Engagements	152	▲ 270.7%
Total Engagements	**25,023**	▲ **218.3%**

The number of engagements increased by

▲ **218.3%**

since previous date range

Sprout Social:
- Manage all our social activity in one place
- Provides aggregate and by channel performance insights

Provides all key metrics:
- Audience Growth
- Message Volume (Sent, Received)
- Impressions
- Engagements

Supplement with manual tracking:
- Key monthly metrics pulled out and tracked in excel.
- Paid ads detailed insights pulled from individual channel ad tool.

Example: Aggregated Email Tracking

2016 Email Newsletter Summary — **CanadaHelps**

Date	Email Name	Total Sent	Received	Total Opened	Open Rate %	Total Clicks	CTR Total	CTR Opens	Trans-actions	Revenue	Conversion Rate	Revenue Per Send	Bounced	Bounce Rate	Opt-Outs (+DNC)	Opt-Out Rate	Complain	Complain Rate	NOTES
DECEMBER TOTAL		2,619,146	2,554,937	484,495	18.5%	16824	0.64%	3.47%	7729	$ 1,042,388.65	0.30%	$ 0.40	64209	2.45%	14159	0.54%	457	0.02%	
07-Dec-15	Holiday Newsletter	362,711	344,458	77,229	21.3%	2586	0.71%	3.35%	442	$ 47,656.00	0.12%	$ 0.13	18253	5.03%	1783	0.49%	63	0.02%	We had issues with rendering in email so we stopped deployment after A/B test and emailed again
		36,275	35,957	8,732	24.1%	310	0.85%	3.55%	111	$ 7,480.00			318	0.88%	213	0.59%	10	0.03%	
		36,246	35,998	8,740	24.1%	290	0.80%	3.32%					248	0.68%	175	0.48%	5	0.01%	
		290,190	272,503	59,757	20.6%	1986	0.68%	3.32%	331	$ 40,176.00			17687	6.09%	1395	0.48%	48	0.02%	
15-Dec-15	Charitable Gift Guide email	363,455	350,161	65,415	18.0%	2039	0.56%	3.12%	556	$ 53,639.00	0.15%	$ 0.15	13294	3.66%	1607	0.44%	74	0.02%	
15-Dec-15	French Holiday Newsletter	20,888	20,601	6,261	30.0%	164	0.79%	2.62%	14	$ 643.00	0.07%	$ 0.03	287	1.37%	211	1.01%	5	0.02%	
15-Dec-15	French Holiday Newsletter - I	106	105	40	37.7%	1	0.94%	2.50%	0	$ -	0.00%	$ -	1	0.94%	1	0.94%	0	0.00%	This was resent to old subscribers who didn't have their language updated. Probably not contacted since July.
15-Dec-15	EN Holiday Newsletter - Rese	27,188	25,580	8,926	32.8%	245	0.90%	2.74%	12	$ 1,000.00	0.04%	$ 0.04	1608	5.91%	370	1.36%	23	0.08%	This was resent to old subscribers who didn't have their language updated. Probably not contacted since July.
20-Dec-15	ChariableGifts_Template	391,947	389,156	81,895	20.9%	3103	0.79%	3.79%	970	$ 118,656.31	0.25%	$ 0.30	2791	0.71%	1861	0.47%	65	0.02%	
21-Dec-15	CharitableGifts_FR	20,964	20,824	6,128	29.2%	204	0.97%	3.33%	17	$ 1,616.00	0.08%	$ 0.08	140	0.67%	180	0.86%	8	0.04%	
27-Dec	DEC27_EOY-FR-NOCharity	12,006	11,853	2,951	24.6%	95	0.79%	3.22%	32	$ 1,631.00	0.27%	$ 0.14	153	1.27%	95	0.79%	4	0.03%	
27-Dec	DEC27_EOY-FR-OneCharity	8,261	8,200	2,405	29.1%	75	0.91%	3.12%	41	$ 3,270.00	0.50%	$ 0.40	61	0.74%	81	0.98%	0	0.00%	
27-Dec	DEC27_EOY-FR-TwoCharity	494	493	176	35.6%	22	4.45%	12.50%	6	$ 1,075.00	1.21%	$ 2.18	1	0.20%	1	0.20%	0	0.00%	
27-Dec	DEC27_EOY-FR-FourCharity	72	72	29	40.3%	8	11.11%	27.59%	0	$ -	0.00%	$ -	0	0.00%	0	0.00%	0	0.00%	
27-Dec	DEC27_EOY-FR-SixCharity	110	110	49	44.5%	14	12.73%	28.57%	22	$ 825.00	20.00%	$ 7.50	0	0.00%	0	0.00%	0	0.00%	
TOTAL FRENCH		20,943	20,728	5,610	26.8%	214	1.02%	3.81%	101	$ 6,801.00	0.48%	$ 0.32	215	1.03%	177	0.85%	4		
27-Dec	DEC27_EOY-EN-NoCharity	255,371	252,879	51,893	20.3%	1560	0.61%	3.01%	406	$ 46,650.00	0.16%	$ 0.18	2492	0.98%	1481	0.58%	35	0.01%	
27-Dec	DEC27_EOY-EN-OneCharity	120,318	119,590	29,205	24.3%	1105	0.92%	3.78%	564	$ 102,615.88	0.47%	$ 0.85	728	0.61%	793	0.66%	12	0.01%	
27-Dec	DEC27_EOY-EN-TwoCharity	12,294	12,238	3,754	30.5%	376	3.06%	10.02%	401	$ 69,106.15	3.26%	$ 5.62	56	0.46%	60	0.49%	0	0.00%	
27-Dec	DEC27_EOY-EN-FourCharity	2,520	2,512	814	32.3%	147	5.83%	18.06%	176	$ 25,539.00	6.98%	$ 10.13	8	0.32%	5	0.20%	0	0.00%	
27-Dec	DEC27_EOY-EN-SixCharity	3,949	3,933	1,365	34.6%	302	7.65%	22.12%	558	$ 81,206.00	14.13%	$ 20.56	16	0.41%	10	0.25%	0	0.00%	
TOTAL ENGLISH		394,452	391,152	87,031	22.1%	3490	0.88%	4.01%	2105	$ 325,117.03	0.53%	$ 0.82	3300	0.84%	2349	0.60%	47		
29-Dec	DEC29_EOY-EN-NoCharity	206,351	198,040	13,991	6.8%	440	0.21%	3.14%	223	$ 43,376.00	0.11%	$ 0.21	8311	4.03%	928	0.45%	32	0.02%	
29-Dec	DEC29_EOY-EN-OneCharity	92,696	89,265	7,619	8.2%	312	0.34%	4.10%	204	$ 21,625.00	0.22%	$ 0.23	3431	3.70%	590	0.64%	22	0.02%	
29-Dec	DEC29_EOY-EN-TwoCharity	8,733	8,576	889	10.2%	112	1.28%	12.60%	80	$ 12,302.00	0.92%	$ 1.41	157	1.80%	26	0.30%	1	0.01%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-EN-FourCharity	1,753	1,727	207	11.8%	35	2.00%	16.91%	53	$ 13,770.00	3.02%	$ 7.86	26	1.48%	3	0.17%	0	0.00%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-EN-SixCharity	2,666	2,626	309	11.6%	102	3.83%	33.01%	290	$ 33,565.00	10.88%	$ 12.59	40	1.50%	4	0.15%	0	0.00%	Initial Results - approx. 6 days
TOTAL ENGLISH		312,199	300,234	23,015	7.4%	1001	0.32%	4.35%	850	$ 124,638.00	0.27%	$ 0.40	11965	3.83%	1551	0.50%	55		
29-Dec	DEC29_EOY-FR-NoCharity	9,193	9,094	1,077	11.7%	24	0.26%	2.23%	6	$ 175.00	0.07%	$ 0.02	99	1.08%	88	0.96%	4	0.04%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-FR-OneCharity	5,985	5,937	769	12.8%	26	0.43%	3.38%	12	$ 876.00	0.20%	$ 0.15	48	0.80%	74	1.24%	2	0.03%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-FR-TwoCharity	330	329	54	16.4%	5	1.52%	9.26%	6	$ 805.00	1.82%	$ 2.44	1	0.30%	5	1.52%	0	0.00%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-FR-FourCharity	42	42	4	9.5%	6	14.29%	150.00%	0	$ -	0.00%	$ -	0	0.00%	0	0.00%	0	0.00%	Initial Results - approx. 6 days
29-Dec	DEC29_EOY-FR-SixCharity	64	64	49	76.6%	6	9.38%	12.24%	15	$ 1,340.00	23.44%	$ 20.94	0	0.00%	0	0.00%	0	0.00%	Initial Results - approx. 6 days
TOTAL ENGLISH		15,614	15,466	1,953	12.5%	67	0.43%	3.43%	39	$ 3,196.00	0.25%	$ 0.20	148	0.95%	167	1.07%	6		
31-Dec	DEC31_EOY-EN-NoCharity	253,168	251,394	51,053	20.2%	1286	0.51%	2.52%	654	$ 92,717.80	0.26%	$ 0.37	1774	0.70%	1536	0.61%	34	0.01%	
31-Dec	DEC31_EOY-EN-OneCharity	119,683	119,000	27,966	23.4%	846	0.71%	3.03%	519	$ 97,971.00	0.43%	$ 0.82	683	0.57%	898	0.75%	19	0.02%	
31-Dec	DEC31_EOY-EN-TwoCharity	12,383	12,323	3,465	28.0%	268	2.16%	7.73%	286	$ 48,175.00	2.31%	$ 3.89	60	0.48%	54	0.44%	0	0.00%	
31-Dec	DEC31_EOY-EN-FourCharity	2,571	2,562	788	30.6%	112	4.36%	14.21%	185	$ 19,330.00	7.20%	$ 7.52	9	0.35%	5	0.19%	0	0.00%	
31-Dec	DEC31_EOY-EN-SixCharity	4,118	4,086	1,303	31.6%	209	5.08%	16.04%	372	$ 34,848.00	9.03%	$ 8.46	32	0.78%	8	0.19%	0	0.00%	
TOTAL ENGLISH		391,923	389,365	84,575	21.6%	2721	0.69%	3.22%	2016	$ 293,041.80	0.51%	$ 0.75	2558	0.65%	2501	0.64%	53		

Example: Financial

	Transaction Amount					Number of transactions					Average Transaction Amount		
	This Fiscal $	Last Fiscal $	% Change $	% of Total This Fiscal	% of Total Last Fiscal	This Fiscal #	Last Fiscal #	% Change #	% of Total This Fiscal	% of Total Last Fiscal	This Fiscal Avg Tx	Last Fiscal Avg Tx	% Change Avg Tx
Mar-17													
Portal Donations:													
Single Donation	$ 1,950,295	$ 1,433,364	36%	22%	54%	9,051	6,362	42%	11%	11%	215	225	-4%
Monthly Giving	$ 1,363,911	$ 1,137,244	20%	16%	43%	22,031	18,212	21%	27%	31%	62	62	-1%
Gifts to CH	$ 15,875	$ 14,179	12%	0%	1%	2,750	2,071	33%	3%	3%	6	7	-16%
Gift Cards Purchased	$ 41,228	$ 15,066	174%	0%	1%	519	228	128%	1%	0%	79	66	20%
Securities	$ 430,293	$ 56,985	655%	5%	2%	62	26	138%	0%	0%	6,940	2,192	217%
SubTotal	$ 3,801,603	$ 2,656,837	43%	44%	40%	34,413	26,899	28%	42%	45%	110	99	12%
Charity Donations:													
Single Donation	$ 2,917,018	$ 2,445,061	19%	34%	37%	17,174	14,158	21%	21%	24%	170	173	-2%
Monthly Giving	$ 591,318	$ 461,001	28%	7%	7%	11,290	8,209	38%	14%	14%	52	56	-7%
Gifts to CH	$ 8,040	$ 8,569	-6%	0%	0%	1,390	1,343	3%	2%	2%	6	6	-9%
SubTotal	$ 3,516,375	$ 2,914,631	21%	40%	44%	29,854	23,710	26%	37%	40%	118	123	-4%
GivingPages	$ 381,780	$ 422,664	-10%	4%	6%	3,628	3,100	17%	4%	5%	105	136	-23%
API Partner Program	$ 136,392	$ 198,854	-31%	2%	3%	2,416	448	439%	3%	1%	56	444	-87%
P2P	$ 431,439	$ 252,543	71%	5%	4%	7,060	3,429	106%	9%	6%	61	74	-17%
Events Platform Donations	$ 38,120	$ 11,038	245%	0%	0%	228	138	65%	0%	0%	167	80	109%
Events Tickets Revenue	$ 386,207	$ 174,009	122%	4%	3%	4,186	1,764	137%	5%	3%	92	99	-6%
TOTAL	$ 8,691,915	$ 6,630,576	31%	100%	100%	81,785	59,488	37%	100%	100%	106	111	-5%
Daily Average	$ 280,384	$ 213,890											

- Google Analytics is a great indicator but not sufficient for financial reporting.
- We use SAP for our Financial reporting; SAGE and QuickBooks are more commonly used by charities.
- Financial reports are very specific to your organization.
- For example, our revenue reports at CanadaHelps are split by Direct-to-Donor versus Charity Client, by type of donation.
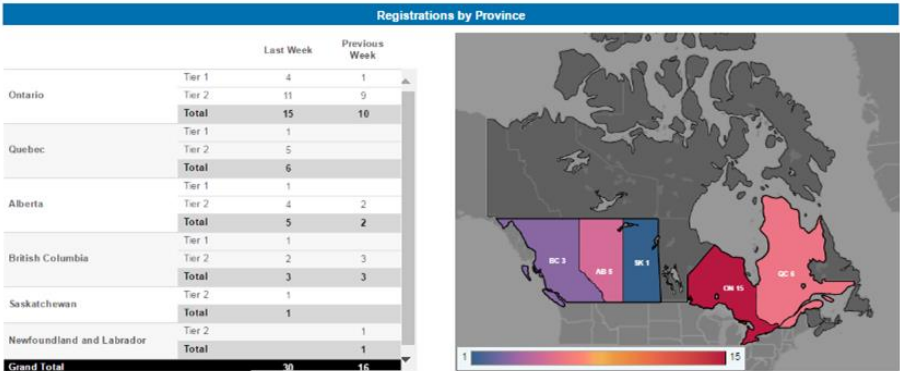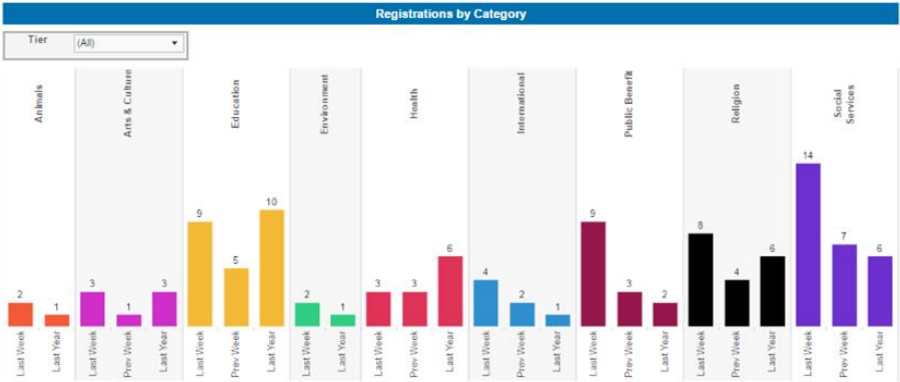- Most charities track at the Program/Fund level.

Example: Key Performance Indicators

Measurable values that demonstrate how effectively your organization is achieving key objectives

Dimensions: consistent ways of categorizing your data

Measures: numerical values that can be aggregated to provide meaning to your dimensions

CanadaHelps Dimensions	CanadaHelps Measures
Charity Registration Tier	Registration count
Charitable Category	Revenue
Geography (Province, Metro, Community)	Number of donations
	Number of donors
Time (Last Week, Previous Week, Same Week Last Year, Past 30 Days, etc.)	Number of new donors
	Number of repeat donors
Rank	
Product Type	

Breakout Sessions!

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Creating an Action Plan!

Internal Assessment: Where do you stand across the 7 dimensions?

Data Strategy	Data Collection	Data Cleansing	Data Storage	Analysis & Execution	Measurement & Reporting

Where am I today?
What systems, processes, and people do I have in place across each dimension? What are my areas of strength and weakness?

Where do I want to be tomorrow?
How can I improve my performance across each dimension? What are my short, medium and long-term goals?

What is my roadmap?
How can I improve/advance across each dimension? What are my low hanging fruit opportunities and what are my larger challenges?

What support do I need?
What are my expertise gaps? What support, training, or assistance do I need across each dimension?

What tools do I need?
Are my current tools effective or do I need to replace them? Are there areas where I need new tools or need to optimize the ones that I currently have?

What specific program can I apply this to?
What programs do I currently have in place that would benefit from advancements in these areas?

Plan	Prepare	Execute

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Exercise: Where we are today!

This is how we would answer the following questions across the 7 dimensions

	Data Strategy	Data Collection	Data Cleansing	Data Storage	Analysis & Execution	Measurement & Reporting
Where am I today?						
Where do I want to be tomorrow?						
What is my roadmap?						
What support do I need?						
What tools do I need?						
What program can I apply this to?						

CanadaHelps: Where we are today!

This is how we would answer the following questions across the 7 dimensions

	Data Strategy	Data Collection	Data Cleansing	Data Storage	Analysis & Execution	Measurement & Reporting
Where am I today?	3-year data strategy coming to completion in the next few months	Transactional data collected via online donations	Internal controls and quality assurance procedures	Multiple databases for transactional and product data	Support analysis and insights across the organization	Use of SQL server and Tableau to deliver KPIs
Where do I want to be tomorrow?	More robust analytical tools and data to support CanadaHelps	Addition of supplemental explicit and implicit user input	Use of external data to standardize internal geography data	Migration of data to a single database system	Automated predictive models to support marketing & charity engagement	Migration of all reporting from SQL server to Tableau
What is my roadmap?	Future data strategy is a key part of ongoing organizational strategy planning	Collaboration with Marketing team to develop interactive user features on website	Source external data to help standardize CanadaHelps transactional data	Plan in place to migrate data from PostgreSQL to SQL Server	Evaluate needs, develop and test models, implement and automate	Evaluate effort to migrate each SQL report and plan appropriately
What support do I need?	New systems/resources to support infrastructure/analytics	Feature development work from Marketing and Technology teams	Consultation with external vendors or partners (e.g. StatsCan)	Technology team and database administrator	Data & Analytics team to research appropriate modeling techniques	Data & Analytics team to evaluate & migrate
What tools do I need?	Beefed up hardware and software to support big data analytics	.NET & SQL Server infrastructure for data collection	Updated Postal Code Conversion File from Canada Post / StatsCan	Ispirer MnMTK software for database migration	R, Python and SQL Server software	SQL Server and Tableau
What program can I apply this to?	Various marketing and charity engagement efforts	Resulting data can be applied to current and future product features	All initiatives and KPIs that involve geographical segments	Data storage applies to all CanadaHelps programs	Current & future product features, programs, etc.	Measurement & Reporting applies to all CanadaHelps programs

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DATA WORKSHOPS

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