



# How To Use Data To Manage Your Nonprofit

**Operate like a high-performing organization  
while staying grounded in your mission.**



You're juggling campaign reports, preparing for your next board meeting, and wondering how to expand your impact with the team you have. You know your data holds the answers, but only if you can make sense of it—and empower your team to act on it.

Your mission is powerful, and your data is what fuels progress. Nonprofit leaders—especially development directors poised to become executive directors—must approach their work with the mindset of a data-informed strategist. You need clarity in your metrics, visibility into what drives impact, and systems that support your goals at every stage. This data supports your fundraising strategy and is the foundation of executive-level decision-making, budgeting, transparency, and organizational forecasting.

This guide will show you how to turn your everyday fundraising efforts into long-term momentum, positioning your organization to grow and sustain impact.

In this e-book, you'll discover how to:

- Build a culture of performance and accountability rooted in clear [data insights](#)
- [Use data to grow](#) sustainable fundraising programs
- Empower your team with [fundraising systems](#) that support success
- Tell powerful impact [stories](#) using metrics that your board and funders care about



To make this guide actionable, it's organized into three phases with markers:

► **START STRONG** – Build a solid foundation with clean data, essential KPIs, and standard reports that fuel your day-to-day fundraising.

► **SCALE SMART** – Strengthen your systems with automated workflows, cross-team collaboration, and performance dashboards.

► **LEAD WITH INSIGHT** – Use data storytelling, financial oversight, and benchmarking to guide board decisions and drive strategic growth.

Whether you're starting from scratch or optimizing existing systems, use these sections to assess where you are and take your next best step forward in your organization's data strategy. Look for these phase markers throughout the guide to help you implement what matters most—right now and in the future.





## ► START STRONG

**Focus:** *Build your foundation with clean data, essential KPIs, and simple reports that support stewardship, transparency, and day-to-day operations.*

This section covers the building blocks of nonprofit data success—from identifying the right metrics to managing your data responsibly. If your team is just starting to dive into data or looking to formalize your reporting process, these tools will help you get aligned and grow with intention.



## Part 1: The role of metrics in nonprofit leadership

To operate effectively, nonprofit organizations must track more than just donations. Strategic [key performance indicators \(KPIs\)](#) provide essential insight into what drives results across fund development strategies, financial planning, program delivery, and operations. Understanding these metrics helps leadership teams make strategic decisions about their nonprofit's future based on evidence and outcomes.

Start by grounding your organization in core KPIs, creating a baseline for financial and operational performance. These foundational metrics help you understand your fundraising effectiveness, providing a baseline for deeper reporting and dashboard strategies as your organization matures.

### Core nonprofit fundraising KPIs

These metrics form the foundation of your fundraising data strategy. If any terms feel new, that's okay—as you keep reading, you'll see how these metrics connect to fundraising strategies, specific reports, and dashboards that support decision-making.

- **Net revenue margin** – Compare total revenue to total expenses to assess your financial cushion and plan for reinvestment or program growth.
- **Cost per dollar raised (CPDR)** – Calculate how much you spend to raise each dollar (typically: fundraising expenses ÷ total contributions) to evaluate efficiency.
- **Aging donor pledges** – Monitor outstanding donor commitments to ensure timely follow-up and revenue realization.

- **Donor lifetime value (LTV)** – Estimate the total giving potential of a donor based on past gifts and retention patterns to prioritize stewardship.
- **Donor retention and attrition rates** – Track how many donors return year over year to assess loyalty and identify engagement gaps.
- **Program return on investment (ROI)** – Connect your fundraising investments to mission impact by comparing program outcomes to associated costs.
- **Multi-year trend analysis** – Spot patterns in donor behavior, campaign performance, or revenue changes over time to guide strategy.

**PRO TIP:** Don't just track these numbers—use them to tell a strategic story. Expand into enterprise-level metrics that help forecast impact, shape investment strategy, and engage your board as your organization matures.





## Advanced fundraising metrics

- **Major gift pipeline velocity** – Measure how quickly prospects move through the donor engagement cycle and make a contribution
- **Planned and legacy giving metrics** – Track pipeline health for legacy gifts
- **Endowment yield performance** – Assess investment sustainability
- **Capital campaign pyramid tracking** – Monitor momentum across gift levels
- **Corporate partnership ROI** – Evaluate revenue and mission alignment



## Part 2: Data governance and trust

As a current or future executive, you're also the steward of your organization's data privacy and integrity. With rising donor expectations and evolving regulations, nonprofits of all sizes need a clear approach to managing data responsibly.

Start by implementing core governance practices that build trust and ensure consistency across your systems.

Key practices to implement now:

- **Establish data retention and deletion protocols** – Clarify how long to keep records and when to safely remove outdated information.
- **Define user roles and access levels across departments** – Limit access to sensitive data based on staff responsibilities.
- **Adopt a donor privacy policy and include it in your online donation forms** – Show donors that their information is being handled responsibly.
- **Keep up with legal standards for data protection** – Ensure compliance with regulations like the General Data Protection Regulation (GDPR), the California Consumer Privacy Act (CCPA), or your country, state, or provincial equivalents.

Nonprofit CRM tools like user access controls (to limit who can view or edit sensitive data), activity tracking (to monitor changes and prevent errors), and address validation (to keep contact info accurate) help ensure your records stay clean, secure, and compliant throughout the year.

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As your organization grows, prioritize these scalable data governance practices:

1. **Implement role-based access controls** – Protect sensitive data by assigning permissions based on team roles and responsibilities.
2. **Document and share your data standards** – Define how data should be entered, updated, and maintained to ensure consistency across the organization.
3. **Conduct regular data audits** – Schedule quarterly or biannual checks to catch duplicates, outdated records, and formatting errors.
4. **Track changes with audit logs** – Maintain transparency by monitoring who made updates and when—especially useful during staff transitions or audits.
5. **Provide ongoing team training** – Equip staff with clear guidelines and refresher training to maintain strong data practices across departments.

Once these foundational practices are in place, you'll be ready to scale your governance strategy, which will be explored further in the **LEAD WITH INSIGHT** section.



## Part 3: Turning nonprofit data into action

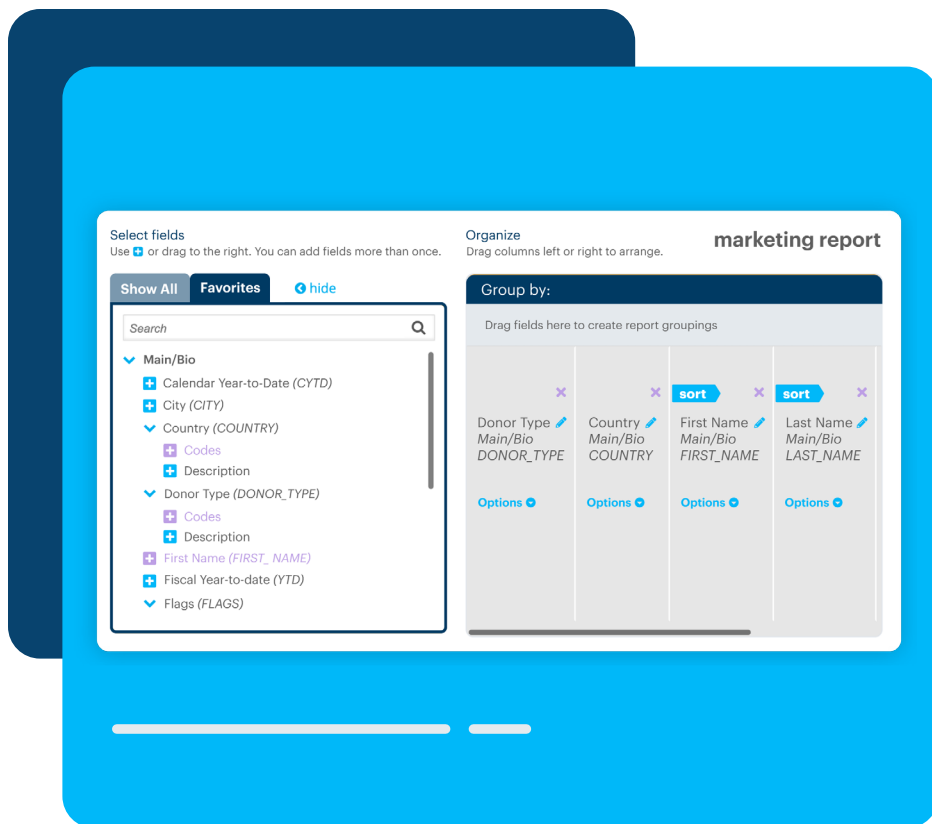
Data is only powerful when it's accessible and actionable. Your organization likely has a wealth of data—donor histories, campaign results, event records—but the real value emerges through reporting.

Use [reporting and dashboards](#) to:

- Spot [donor giving patterns](#) before they plateau or decline
- Guide board conversations with visual evidence
- Set and adjust fundraising targets in real time

Whether you're just starting to build standard reports or managing a full dashboard system, your goal is the same: to turn information into action. The best reporting tools support this journey—regardless of your organization's data maturity level.





## Essential reports to build and monitor

The metrics above help you establish a baseline—now let's explore the reports that turn those numbers into a data-driven fundraising strategy.

- **New donor acquisition by revenue channel** – Track how first-time donors are finding your organization, whether through email, events, social media, or direct mail, so you can invest in the most effective outreach channels.
- **Lapsed donor recapture trends** – Identify which re-engagement strategies are successfully bringing donors back and where you may be losing momentum with past supporters.

- **Donor retention rate** – Measure the number of donors who return year after year to assess the long-term health of your fundraising program.
- **Recurring giving health reports** – Monitor the growth, retention, and monthly value of your recurring donor base (e.g., bi-weekly, monthly, quarterly, or annual recurring sustainer donors) to evaluate revenue stability.
- **Revenue by appeal type (method)** – Analyze giving by solicitation methods, such as direct mail, email, social media, or in-person event asks, to identify which outreach channels generate the highest donor response and revenue.
- **Revenue by campaign (initiative)** – Compare performance across major fundraising initiatives—like spring appeals, year-end drives, GivingTuesday, or capital campaigns—to see which themes and timelines drive the strongest results.
- **Top donor and prospect watchlists** – Stay informed on your highest-impact donors and prospects by tracking recent gifts, engagement activity, and giving frequency to support proactive stewardship.
- **Volunteer contribution valuation** – Quantify the economic impact of volunteer hours using standardized valuation methods to support grant applications and board reports.
- **Legacy giving forecast** – Project future revenue from bequests and other planned gifts using engagement trends, giving history, and intent indicators.

**CUSTOM REPORT TIP:** Use tools like [DonorPerfect's Report Builder](#) to track lapsed donor recovery, campaign ROI, or recurring gift growth—all without pulling multiple exports.



## Fundraising dashboards for decision-making

While individual reports help track tactical performance, executive dashboards turn this data into strategic insight.

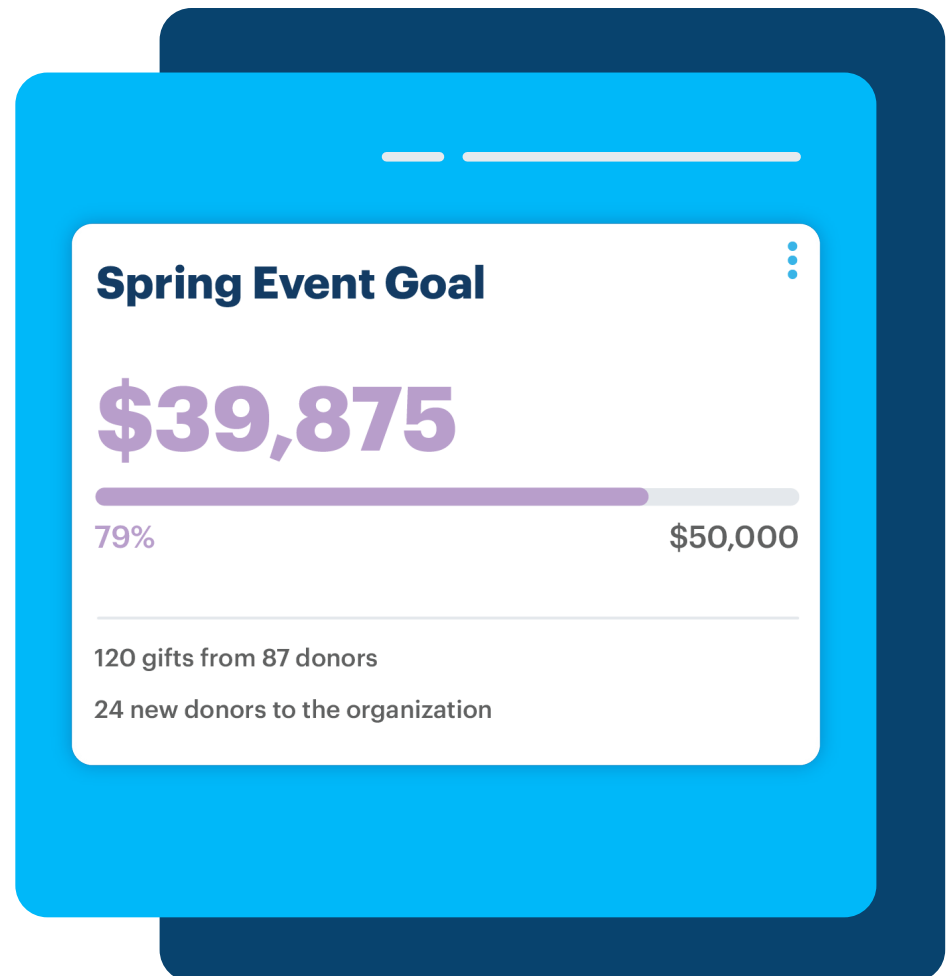
- **Executive summaries for board meetings** – Create high-level charts and graphs that translate fundraising and financial data into [easily digestible snapshots](#) for leadership and board presentations.
- **Cross-department KPIs** – Track performance metrics across development, finance, marketing, and programs to foster [data alignment](#) and demonstrate shared impact.
- **Donor pipeline conversion snapshots** – Visualize movement through your major gift or campaign pipelines—tracking a donor’s journey from identification to stewardship—to evaluate momentum and conversion rates.
- **Endowment and liquidity ratios** – Monitor the health of long-term investments and cash reserves to ensure financial sustainability and meet policy or compliance benchmarks.
- **Custom grant tracking or campaign target dashboards** – Build dashboards tailored to your fundraising priorities, such as tracking grant deadlines, reporting requirements, or campaign progress toward specific financial goals.

[Scheduled reports](#) save time and ensure insights are delivered consistently, without requiring manual effort. By automating the delivery of key dashboards and performance summaries, your team can stay focused on strategy while still keeping stakeholders informed with the latest data.

**EXECUTIVE VIEW:** DonorPerfect [dashboards](#) help you present campaign performance, donor trends, and revenue forecasts visually—so your leadership team can review progress, identify priorities, and make fast, confident decisions.

## Best practice: Set a cadence for data review

To drive strategic action, your dashboards and reports must be kept current. Operational KPIs (like campaign ROI or donor conversion) should be reviewed weekly or bi-weekly, while high-level performance indicators (like endowment yield or liquidity ratios) may be assessed monthly or quarterly. Establishing a consistent rhythm for data refresh—aligned with board meetings, campaign cycles, and fiscal planning—ensures that decisions are timely, informed, and grounded in real-time insights.



## Sample elements of an executive dashboard

Visual clarity and relevance are essential when presenting data to executive teams or boards. Strong executive dashboards should include:

- **Campaign ROI snapshots (actual vs. goal)** – Visualize how campaigns perform against target outcomes
- **Donor pipeline conversion rates by stage** – Monitor how major gift prospects move from identification to stewardship
- **Year-over-year retention and upgrade trends** – Spot loyalty improvements or declines in donor behavior
- **Endowment performance vs. target yield** – Compare actual endowment earnings to your organization's expected return (target yield) to assess long-term sustainability
- **Liquidity ratio alerts** – Determine whether your organization can meet short-term obligations with available assets (typically calculated by dividing current assets by current liabilities)
- **Reserve health tracking** – Evaluate how long your organization can continue operations during funding gaps using existing reserves, often expressed in months of operating expenses.

Use color-coded visuals, directional trend arrows, and simple tooltips (pop-up text that appears when hovering over a data point) to highlight the metrics that drive confident, real-time decision-making for your leadership team.

## Who uses dashboards and how?

Different roles require different data views to stay focused and effective. That's why customizing dashboards based on role is essential to driving adoption and ensuring your team can act on the insights in front of them.

Ongoing training is also key. When staff members understand not only what to track, but why it matters to their role, they're more likely to engage with your nonprofit CRM and use it to its full potential. Whether you're onboarding new hires or rolling out dashboard features to the broader team, take the time to walk through functionality and examples tailored to their responsibilities.

- **Development Director** – Tracks donor conversion rates, campaign performance, and pipeline velocity to manage day-to-day fundraising.
- **Finance Officer** – Focuses on liquidity ratios, fundraising efficiency (CPDR), and sub-ledger performance to align revenue and budget forecasts.
- **Executive Director** – Uses high-level summaries of ROI, retention trends, and cross-department KPIs to guide strategic decisions and engage the board.

**PRO TIP:** Invest in training beyond just dashboards. Regular training sessions on data best practices, CRM functionality, and key fundraising reports help your team feel confident, stay efficient, and make data-driven decisions.

**NEED HELP CUSTOMIZING DASHBOARDS?** DonorPerfect's [training resources](#) and live support can show you how to create role-specific dashboards, automate reporting, and help every user access the insights they need.





## ► SCALE SMART

**FOCUS:** *Strengthen your systems, align teams around shared data, and streamline workflows with reporting dashboards and integrations.*

Now that your foundation is set, it's time to reduce friction, enhance collaboration, and take your fundraising strategy to the next level. These practices help your team work smarter with unified systems, automated reports, and data-driven fundraising program design.



## Part 1: Designing a data-driven fundraising program

Fundraising strategies must be integrated, insight-led, and agile. A sophisticated approach combines robust data analytics with a [multi-channel outreach](#) plan to increase efficiency and deepen engagement across donor segments.

Utilize your nonprofit CRM and reporting tools to:

- Measure and compare campaign-specific ROI to determine which appeals yield the highest return
- Evaluate [corporate sponsorship opportunities](#) based on strategic alignment and financial contribution
- Track [major donor activity](#) through dashboards that surface upgrade potential and stewardship needs
- Analyze the performance of fundraising channels—including email, social, direct mail, and events—to inform future investments

**PRO TIP:** Incorporate [text-to-give solutions](#) into your campaign mix to enhance accessibility and increase real-time response, especially during live events or urgent appeals.



### Strategic metrics to guide fundraising program design

To design and scale data-informed fundraising strategies, development leaders should monitor metrics that go beyond campaign snapshots. These advanced indicators provide deeper visibility into donor behavior, engagement pipelines, and revenue diversification.




## Donor pipeline and legacy giving:

- **Major gift portfolio tracking** – Manage high-capacity donors through each stage of identification, cultivation, solicitation, and stewardship, aligned with your [Donor Journey stages](#)
- **Legacy giving pipeline metrics** – Identify and engage planned giving prospects through intent signals, engagement scores, and giving history
- **Donor Advised Fund (DAF) tracking** – Monitor giving patterns from donor-advised accounts and identify opportunities for direct engagement

**PROSPECT RESEARCH INSIGHT:** Use integrated wealth screening tools to surface donor capacity, giving likelihood, and upgrade potential—so you can prioritize outreach and build a stronger major gift pipeline. Tools like [DonorSearch](#) can help identify and segment high-capacity prospects based on giving history and wealth indicators.

☰ Detailed Overview

Edit Section



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## Campaign and revenue channel performance:

- **Campaign-specific dashboards** – Track the performance of capital, annual, or special initiative campaigns to stay aligned with fundraising goals
- **Multi-channel fundraising ROI comparison** – Analyze and compare performance across channels like email, social, direct mail, and events to guide investment
- **Event success metrics** – Assess participation rates, sponsorship revenue, donor conversion, and net proceeds from fundraising events

## Revenue and segment analysis:

- **Corporate sponsorship scoring rubrics** – Evaluate potential partners based on shared values, brand alignment, audience reach, and financial ROI
- **Membership revenue tracking** – Monitor dues-based income from member programs to support reliable forecasting and retention initiatives
- **Affinity group engagement indicators** – Track interactions and giving trends among segmented supporter groups (e.g., school alumni, patients, families, program graduates)

**PRO TIP:** [Text-to-Give](#) campaigns can complement your multi-channel outreach strategy by offering supporters a fast, mobile-first giving option, especially useful during live events or campaigns with urgency.

Your fundraising strategy should be data-driven, whether you're planning your next campaign or building your major gift portfolio. Let data guide every cultivation effort and appeal.

## Part 2: Connecting teams through shared data

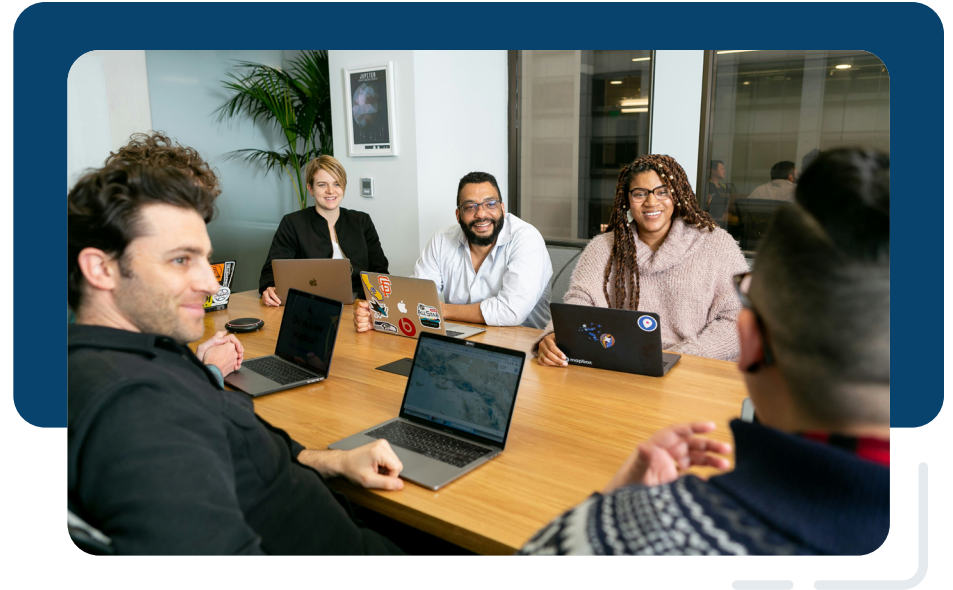
In high-performing nonprofits, true collaboration is driven by shared insights and unified systems. When departments work independently, it limits the visibility and [alignment](#) required to grow. Future-ready leaders must build a data infrastructure that breaks down these barriers and facilitates transparent collaboration.

To build a truly integrated team environment:

- Develop role-based dashboards that provide tailored insights while reinforcing shared objectives
- Automate cross-department workflows for stewardship, reporting, and campaign execution
- Ensure full nonprofit CRM integration with accounting, marketing, and program delivery tools to [align financial and engagement data](#)
- Establish quarterly cross-functional strategy sessions to review KPIs, assess campaign performance, and adjust departmental plans based on real-time metrics

**PRO TIP:** When every team has visibility into the same performance indicators, you create a culture of shared accountability—one that empowers departments to collaborate on solving challenges, optimizing donor engagement, and driving mission outcomes. Leadership must model this alignment by integrating data reviews into executive and board-level decision-making.

### Engaging your board with data



Your board can be your strongest data ally—if they understand the numbers. Use data visualizations and curated metrics to turn complex performance updates into compelling decision-making tools.

Build board engagement with:

- Board-friendly dashboards for campaign ROI and retention trends
- Pre-board meeting data briefs to build confidence in a strategy
- Annual impact scorecards tied to fundraising KPIs

When board members feel informed, they become advocates for investment, strategy, and growth.

**CHECKLIST REMINDER:** Use DonorPerfect's [Clean Data Checklist](#) to prepare your donor management system for year-round reporting and donor stewardship.

### Using data to manage up



Whether you're a development director advocating for a new investment or an executive director seeking board buy-in, data is your strongest ally. Use performance dashboards, donor trends, and ROI reports to present evidence, anticipate questions, and build confidence with your leadership team, executive director, or board of directors. Managing up isn't about reporting more—it's about sharing the right insights at the right time to inform smart decisions and move your mission forward.

## Part 3: Building a system for nonprofit growth

Your fundraising tools should empower your team, not overwhelm them. A strong system combines the right software with [seamless integrations](#), so your data flows automatically between platforms like your CRM, marketing tools, accounting software, and event systems.

Core tools in a connected fundraising system:

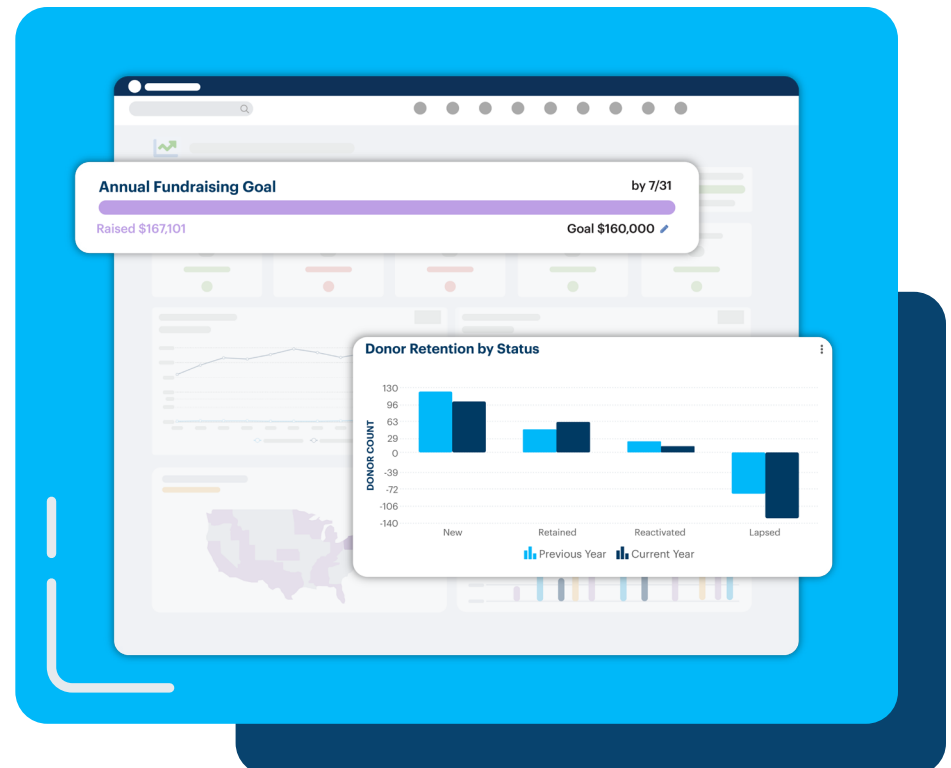
- **Nonprofit CRM** – Your central hub for donor data, tracking, communicating, and reporting
- **Marketing automation** – Send personalized emails and donor journeys automatically
- **Event and volunteer management** – Capture engagement and convert participation into giving
- **Finance/accounting tools** – Sync gift data with Intuit QuickBooks Online, Sage Intacct Accounting, or other systems
- **[Custom reporting](#) and dashboards** – Visualize performance and track key metrics

When your fundraising tools talk to each other, you save time on manual tasks, reduce errors, and make smarter

decisions faster.

**PRO TIP:** Use Application Programming Interfaces (APIs) to sync real-time dashboards, trigger stewardship journeys, or pipe data into finance forecasting tools.

**INTEGRATION INSIGHT:** DonorPerfect's open API and built-in [integrations](#) make it easy to connect your nonprofit CRM to finance tools like QuickBooks, email platforms like Constant Contact, or custom dashboards for board reporting. Automating these data flows can save hours each week—and ensure everyone's working from the same up-to-date information.



## Part 4: Managing data in complex structures

If you operate with chapters, affiliates, or international arms, flexibility is key. There should be a healthy balance between autonomy and oversight related to data management.

Complex structure needs:

- Chapter-level permissions
- Cross-functional reporting
- Fund- or campaign-specific financial tracking
- Multi-currency and compliance reporting



## International fundraising and global data strategy

If your nonprofit operates internationally or solicits cross-border donations, your data strategy must accommodate the complexities of global giving.

Key considerations for international fundraising metrics:

- **Multi-currency support** – Ensure your CRM can process and report donations in different currencies, with accurate conversions for financial reports
- **Regional compliance** – Comply with fundraising and data privacy laws where you operate
- **Localized reporting** – Customize reports and dashboards by country, region, or affiliate to support operational oversight
- **Language localization** – Enable forms, emails, and dashboards in multiple languages when engaging global donor segments
- **Benchmarking internationally** – Use country-specific metrics and sector standards to compare performance across global programs

A globally capable nonprofit CRM ensures you remain mission-aligned, donor-compliant, and insight-ready, no matter where you operate.





## ► LEAD WITH INSIGHT

**FOCUS:** *Use storytelling, benchmarking, and financial reporting to drive executive strategy and deepen stakeholder confidence.*

With your systems in place, you're ready to lead with data. These insights help you shape strategy, communicate your impact, and gain support from boards, funders, and major donors. This phase supports nonprofit executives stepping into visionary leadership.



## Part 1: Ensuring financial compliance

Development professionals are central in aligning revenue generation with responsible financial stewardship. Beyond raising funds, they serve as key contributors to the financial resilience, audit readiness, and regulatory compliance of their organizations.

To lead effectively at the executive level, fundraisers must understand and leverage financial performance metrics that inform strategic planning and ensure accountability.



Dashboards that highlight trends in donor engagement, campaign performance, liquidity, and fund utilization provide vital insights for:

Strategic planning and budgeting

- Transparent board reporting
- Responsive grant applications
- Risk mitigation and compliance readiness

### Financial metrics your fundraising system should support

Revenue stewardship and donor intent:

- **Restricted vs. unrestricted fund tracking** – Understand which funds are designated for specific uses and which are flexible, supporting better forecasting and grant compliance.
- **Multi-state/country registration compliance** – Stay compliant with fundraising regulations in states/countries where you solicit gifts, which protects your nonprofit's credibility and ability to raise funds.
- **Form 990 dashboards and alerts** – Track data points required for IRS filings and share transparent financial performance with your board and funders.

Financial sustainability and risk readiness:

- **Liquidity coverage ratios** – Determine whether short-term obligations can be met with available assets, an essential benchmark for financial health
- **Operating reserve ratio** – Measure how long your organization can maintain operations using existing reserves (at least three months is considered good)
- **Debt-to-surplus ratio** – Evaluate fiscal risk by comparing liabilities against net assets



- **Endowment performance monitoring** – Assess the long-term yield and sustainability of invested funds

Fundraising efficiency and allocation:

- **Program expense ratio** – Demonstrate the percentage of revenue directly supporting mission delivery vs. administrative overhead
- **Fundraising efficiency (CPDR)** – Track and communicate the cost per dollar raised over time to assess and communicate the ROI of fundraising efforts

Financial health goes beyond revenue tracking. By understanding overhead, surplus ratios, and operating reserves, executive-ready fundraisers are better positioned to advocate for reinvestment and balanced budgets and reassure donors and grantmakers that resources are managed responsibly.

## Strengthening your data governance framework

As your nonprofit scales, data governance must evolve from departmental best practices to a formalized, organization-wide strategy that ensures consistency, accountability, and compliance across all systems.

Executive-ready data governance frameworks should include:

- **Enforce organization-wide role-based access policies** – Strategically assign and monitor user access across integrated systems to ensure consistent permissions, prevent unauthorized edits, and support compliance at scale.
- **Operationalize data quality standards** – Translate your data definitions into actionable rules by embedding them into your CRM workflows and staff responsibilities across departments.

- **Implement audit-ready change logs** – Maintain detailed records of data edits, user access, and activity history to support transparency, internal accountability, and audit compliance.
- **Establish a cross-functional governance team** – Designate stakeholders across departments to serve as data stewards who review standards, monitor consistency, and resolve data conflicts as systems evolve.
- **Conduct executive-level data integrity reviews** – Perform scheduled reviews (semi-annually or quarterly) of donor, financial, and program records with leadership involvement to ensure your reports reflect high-quality, decision-ready data.

This level of oversight helps leadership ensure that data is both secure and dependable for high-stakes reporting, performance measurement, and strategic decision-making.

**GOVERNANCE IN ACTION:** DonorPerfect's [role-based permissions](#) help you control access to sensitive donor data, maintain internal accountability, and meet data privacy standards. Customizable data validation settings make it easy to implement these best practices without overburdening your team.



## Part 2: Benchmarking for context and confidence

You may notice a few metrics introduced earlier in this guide. This intentional overlap reinforces their strategic importance, which is now viewed through an external lens that emphasizes sector standards, accountability, and executive-level planning.

Nonprofit executives must assess internal performance and how their organization compares to peers across the sector. While some of the metrics below may be familiar from earlier sections, this perspective emphasizes how benchmarking transforms them into tools for competitive analysis, strategic positioning, and organizational growth.

Leverage trusted sector benchmarks from:

- [AFP Fundraising Effectiveness Project](#)
- [Giving USA](#)
- [DonorPerfect Growth in Giving Report](#)

These benchmarks provide critical reference points across key performance indicators, helping to:

- Identify operational strengths and gaps
- Set realistic fundraising targets
- Justify investment in staff, systems, or infrastructure
- Support major funding proposals and board-level planning

Key metrics to benchmark:

- **Donor retention rate** – Track loyalty and the effectiveness of your stewardship strategy
- **Cost per Dollar Raised (CPDR)** – Evaluate efficiency across campaigns and channels
- **Overhead ratio** – Communicate administrative efficiency while educating funders on the value of infrastructure
- **Liquidity coverage** – Understand your organization's ability to meet short-term financial obligations
- **Fundraising ROI** – Compare fundraising returns to industry standards to optimize strategy

For example, if your board is questioning a dip in donor retention, you can compare your rate to national benchmarks and illustrate how a strategic stewardship plan will close the gap in the next fiscal year.

Remember, benchmarking isn't about competition—it's about context. With clear comparisons, you can celebrate what's working, uncover hidden opportunities, and guide your team toward stronger outcomes.

**EXECUTIVE INSIGHT:** Benchmarking equips nonprofit leaders with credible evidence to defend strategic pivots, motivate board alignment, and strengthen donor confidence. Use these external data points to elevate internal insights and move beyond anecdotal decision-making.

## Part 3: Telling your nonprofit's impact story with data

At the executive level, impact storytelling must move past isolated examples and emphasize quantifiable outcomes. When data is visualized effectively and paired with mission-centered narratives, it becomes a powerful tool to engage boards, inspire donors, and attract strategic partners.

- Present your organization's performance in a way that resonates both intellectually and emotionally:
- Use campaign dashboards to show progress toward strategic goals and reveal donor behavior trends over time
- Display monthly giving growth using visual reports that emphasize donor loyalty and revenue stability
- Illustrate your major donor pipeline with visuals that show cultivation stages and expected gift projections
- Integrate cross-functional metrics (program outcomes, cost per service delivered, revenue by audience segment) to show organizational alignment

### Scenario example: Event metrics

After your signature fundraising event, present a board-ready dashboard that visualizes total ROI—combining sponsorship revenue (cash vs. in-kind), donor acquisition, and post-event donation increases. Use this data to guide your next year's event budget and make the case for increased investment in stewardship.



### Scenario example: Crisis response and revenue recovery

During an unexpected funding shortfall, a regional food bank used its donor engagement dashboard to identify mid-level donors with high engagement scores and recent gift activity. By launching a targeted appeal within 48 hours, they recovered 28% of the projected loss within two weeks. Dashboards also helped leadership monitor campaign urgency, secure emergency board funding, and prioritize stewardship based on giving likelihood, all in real time.

When board members participate in the data conversation, they are better positioned to contribute to sustainability discussions, support fundraising efforts, and advocate for investments in tools and systems that accelerate growth.

By pairing clean, accessible data with meaningful storytelling, you can energize your supporters and position your organization as both mission-driven and performance-focused.





## Example: Using dashboards to drive major gifts

For example, Horizons Youth Foundation, a fictional \$5M nonprofit focused on educational equity, sought to revamp its major gift strategy using data-informed dashboards. By implementing a customizable dashboard system integrated with its donor database, the development team was able to visualize donor pipeline stages, track cultivation milestones, and monitor gift likelihood scores in real time.

Results:

- Increased major gift revenue by 22% year-over-year
- Reduced donor stewardship delays, such as follow-up thank-yous and major gift touchpoints, by 36% using automated task alerts
- Presented donor upgrade trends to board leadership, resulting in expanded campaign investment

Dashboards played a key role in aligning leadership on strategy, allowing development and executive teams to prioritize high-impact relationships and convert prospects faster.

## From strong foundations to strategic growth

As you move from strengthening your core systems to scaling smart strategies and leading with insight, remember that data maturity is an ongoing journey. Whether you're optimizing reports, integrating new tools, managing up, training your team, or shaping high-level strategy, each step you take builds toward sustainable growth and greater mission impact.

Look back on your progress:

► **START STRONG** – Clean data, clear KPIs, and strong governance practices

► **SCALE SMART** – Streamlined systems and cross-team collaboration

► **LEAD WITH INSIGHT** – Strategic benchmarks and data storytelling

Wherever you are in your journey, use this guide as your roadmap to sustainable growth.

With these foundations in place, you're not just following best practices, you're stepping into a future where data drives leadership.

## Leading the future of nonprofit fundraising

As a development director, you're not just raising money—you're driving vision. Your data is your roadmap. Your nonprofit CRM is your command center. You're no longer just executing tasks—you're leading vision and aligning strategy.

In today's environment, nonprofit professionals must be both mission-focused and metrics-savvy. Your role is evolving into that of a systems thinker, a strategic planner, and an executive voice in how your organization grows, communicates, and sustains impact.

Your data is more than a record—it is the foundation for intentional, informed leadership. With the right tools, strategy, and systems in place, you're not just managing operations—you're empowering teams, mobilizing supporters, and stewarding a mission with lasting relevance.

Start building your roadmap to growth with DonorPerfect—your trusted partner in data-driven fundraising success, leadership empowerment, and nonprofit performance excellence.

You're ready. And we're here to help.







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Chaz is dedicated to helping nonprofits achieve their missions. With more than eleven years of donor engagement and fundraising experience, Chaz has led diverse development initiatives, with an emphasis on strategic donor communications and long-term organizational sustainability. Chaz has served in a variety of fundraising roles, including Senior Director of Development for a national nonprofit supporting those living with breast cancer as well as development positions in higher education. Chaz values the important role nonprofits play in helping people, animals, and the environment. He encourages everyone to get involved in supporting charities!

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