

Meaningful Reporting:

A Holistic Approach to Reporting Across Multiple Systems

April 15, 2009

Matt McCabe, VP Community



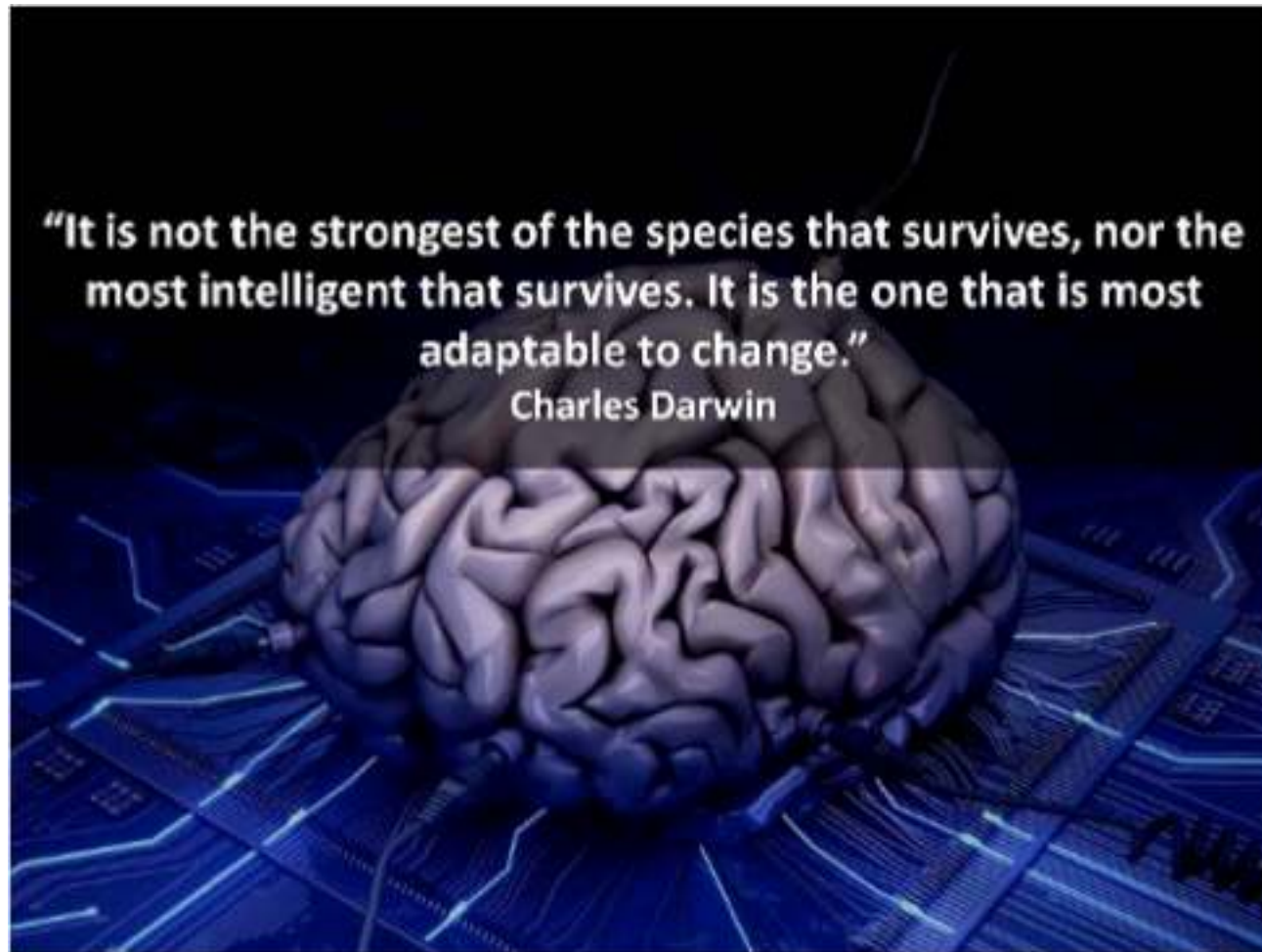
Confidential and Proprietary

Goals for Webinar

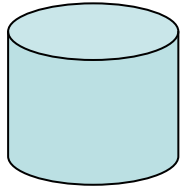
For you to understand:

1. Context
2. Common Reporting Practice
3. The Issues to be overcome
4. Reporting Needs to overcome the issues
5. Current Options
6. Understanding the Value

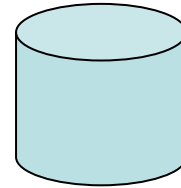
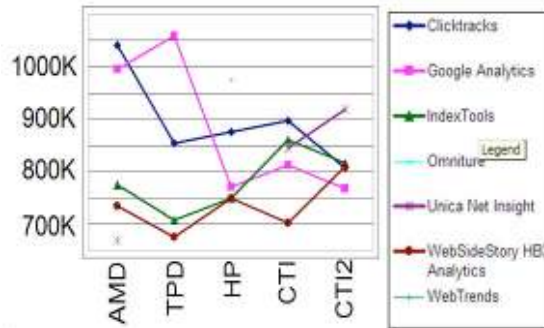
Context



Data is in Silos

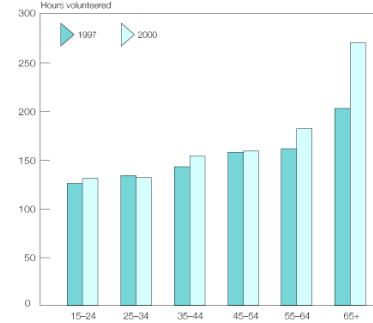


Donor Database



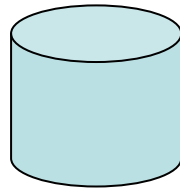
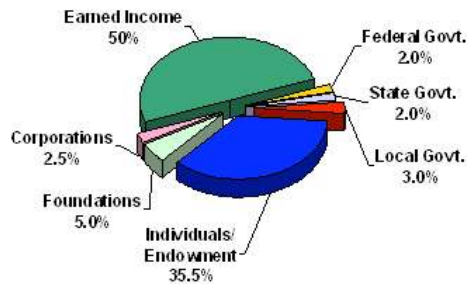
Event Database

Number of Hours per Volunteer by Age Group, 1997 and 2000

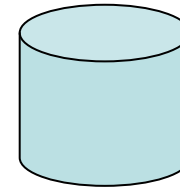
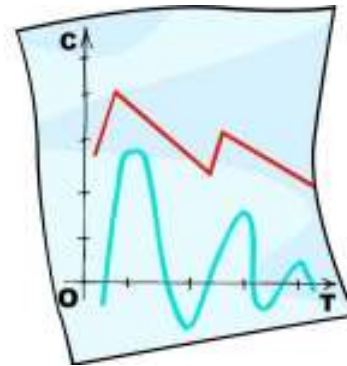


Source: Statistic Canada, 2000

Average Source of Revenue for Nonprofit Arts Organizations (Estimated)



Online Database



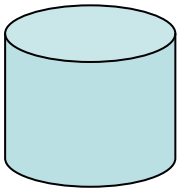
Volunteer Spreadsheet

...and that presents challenges.

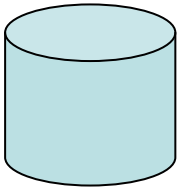
- Technology advances have produced a **plethora of data** that can be **overwhelming, contradictory and confusing.** □
- At most organizations, reporting across systems is **manual and time consuming.**
- Reporting is central as it **provides our indicators of change and intelligence on how to adapt** to constituent behavior, relationships and performance.

Common Reporting Practice

1. Data Extraction



Donor Database



Online Database



Common Reporting Practice

2. Data Consolidation



	2007	2007												2008													
	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
01. Company General And Payroll Totals																											
Revenue	1250	2300	1800	1800	2300	1700	1800	1800	2300	2000	2000	2300	2300	2300	2400	2400	2400	2400	2400	2400	2400	2400	2400	2400	2400	2400	
Multi Year Audit Change	N/A	100%	-27%	0%	14%	-9%	-9%	-9%	17%	13%	-9%	20%	20%	30%	30%	-29%	30%	-30%	30%	30%	30%	30%	30%	30%	30%	30%	
Year Over Year Change	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Average monthly report per unit	1642	347	317	317	433	375	336	417	304	377	433	433	433	377	344	344	344	344	344	344	344	344	344	344	344	344	
02 Search Engine Optimisation																											
Converted Leads from "Direct Address"	46.40%	31.00%	30.90%	30.80%	37.40%	35.10%	36.40%	34.50%	43.50%	30.30%	43.50%	47.50%	36.50%	34.70%	43.30%	41.40%	44.50%	46.00%	46.00%	41.30%	44.70%	44.70%	44.70%	44.70%	44.70%	44.70%	44.70%
Converted leads from "Search Engine"	3.80%	8.40%	9.30%	7.00%	8.80%	5.60%	6.70%	6.00%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%	6.80%
Average Month (per unit average)	N/A	28.48	31.37	46.09	1790.97	1490.87	1300.87	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44	165.44
03 Organic Online Conversion Rates																											
New Organic Registrations	360	36	88	87	71	43	37	46	176	78	416	36	164	109	141	94	176	141	106	141	106	141	106	141	106	141	
Organic Email Capture Rate	83.37%	43.5%	34.9%	33.4%	33.5%	33.8%	34.9%	34.9%	37.9%	38.8%	35.7%	43.9%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%	33.4%
04 Newsletter Health																											
Total Revenue	N/A	36	330	337	407	443	461	488	497	779	507	360	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036	1036
Self Revenue	N/A	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36
Out Out	N/A	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Under Fee	N/A	2,438	3,473	3,473	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348	2,348
Total Revenue	2,438	2,438	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488	3,488
Under Fee % of Total Revenue	N/A	99%	99%	99%	79%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
05 Newsletter Communication																											
Delivery Date	N/A	N/A	N/A	N/A	6/28/07	6/28/07	6/28/07	7/26/07	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	N/A	6/28/07	N/A	N/A	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	6/28/07	
Deliverability	N/A	N/A	N/A	N/A	100%	100%	100%	100%	100%	100%	100%	100%	100%	N/A	100%	N/A	N/A	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Total Revenue	N/A	N/A	N/A	N/A	27	27	27	27	27	27	27	27	27	N/A	27	N/A	N/A	27	27	27	27	27	27	27	27	27	
Self Revenue	N/A	N/A	N/A	N/A	0	0	0	0	0	0	0	0	0	N/A	0	N/A	N/A	0	0	0	0	0	0	0	0	0	
Under Fee	N/A	N/A	N/A	N/A	27	27	27	27	27	27	27	27	27	N/A	27	N/A	N/A	27	27	27	27	27	27	27	27	27	
Under Fee Rate	N/A	N/A	N/A	N/A	100%	100%	100%	100%	100%	100%	100%	100%	100%	N/A	100%	N/A	N/A	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Under Fee Through Fee	N/A	N/A	N/A	N/A	0	0	0	0	0	0	0	0	0	N/A	0	N/A	N/A	0	0	0	0	0	0	0	0	0	
Under Fee Rate	N/A	N/A	N/A	N/A	0%	0%	0%	0%	0%	0%	0%	0%	0%	N/A	0%	N/A	N/A	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Under Fee Rate	N/A	N/A	N/A	N/A	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	N/A	0.00%	N/A	N/A	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
06 Fundraising																											
Monthly Donations	\$	\$6,670	\$	\$4,783	\$	\$7,248	\$	\$4,829	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	\$	\$8,100	
Multi Year Audit Change	N/A	20.88%	89.71%	1.88%	26.86%	28.70%	18.30%	28.91%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%	18.30%
Year Over Year Change	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Average Donation/Donor	\$	\$46.36	\$	\$47.19	\$	\$57.16	\$	\$47.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$	\$57.16	\$
Under Fee	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	\$	281	
Gifts Under Fee	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	\$	1.21	
07 Other Fee Transactions																											
Total Revenue	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	\$	\$1	
Under Fee	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	
Under Fee Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Under Fee Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	

Where nonprofits use and share

Common Reporting Practice

3. Data Reconciliation

Online Giving for April

Accounting Report	\$XXXX
Online Report	\$YYYY
Donor DB Report	\$ZZZZ



Common Reporting Practice

3. Data Reconciliation

Online Giving for April	
Accounting Report	\$XXXX
Online Report	\$YYYY
Donor DB Report	\$ZZZZ

But Why?

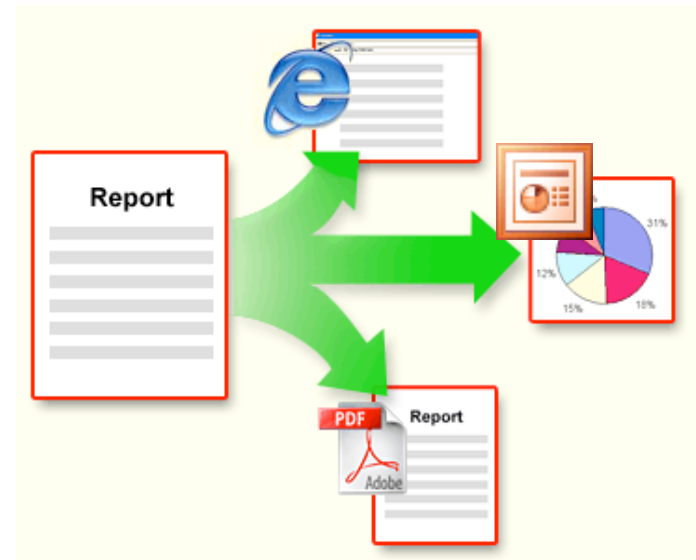
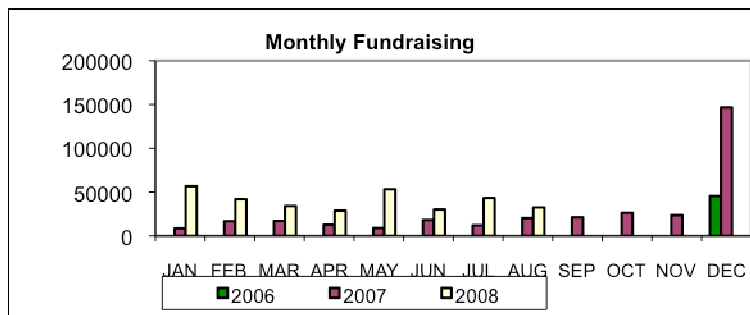
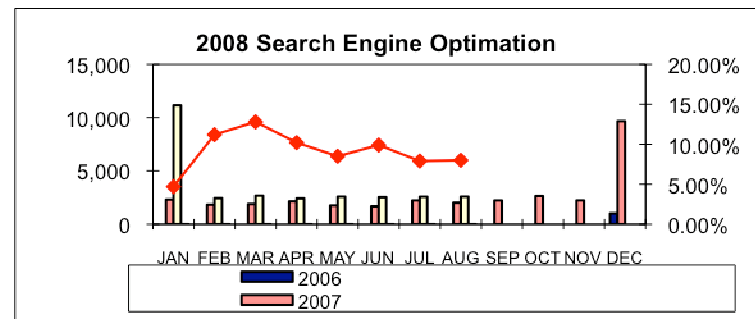
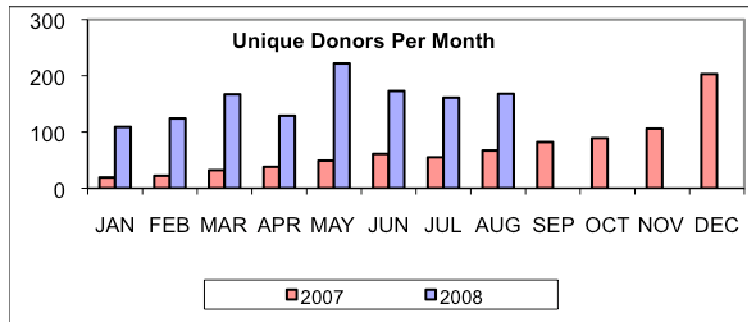
Bank Deposit Reports

**Actual Donation Amounts
(pre-processing fees)**

**Data for event gifts made
online coded as 'Events'
not 'Online'**

Common Reporting Practice

4. Data Presentation



Is that familiar?

Are there other methods you use currently?



What are the Issues?

1. Time

Time Invested in Enterprise Reporting	
Data Extraction	1-3 hours
Data Consolidation	1-3 hours
Data Reconciliation	2-5 hours
Data Presentation	1-3 hours
Total Time	5-14 hours
Total Cost (\$50k annual salary)	\$130 - \$364

Average time invested over 10 years:

~10 hours each month

which equates to

~1,200 hours

or

Three work weeks every year!

What are the Issues?

2. Timeliness

- ✓ Every additional request for information or drill-down could mean starting over at Step 1 (extracting additional data) or Step 2 (pulling up your raw consolidated data) and at least another few hours of work.
- ✓ More importantly, it means a delay of 1 to many days to recompile and deliver the requested data

Impact:

- Decisions are delayed; or
- Decisions are made on partial data

What are the Issues?

3. People

- ✓ **Frustration** which can lead to **Low Morale**
- ✓ **Tedium** which can affect **accuracy and quality** of compilation and reconciliation
- ✓ **Wasted talent** which affects ability to **achieve the mission**

What are other issues?

Are there other general reporting concerns outside of what has been covered?



Reporting Needs

To engage in holistic reporting across disparate systems we need:

- 1) Standards
 - ✓ Internal
 - ✓ External / Industry
- 2) Platform Independent Tools
- 3) Empower end-users to receive, run and drill-down on reports

Reporting Needs

1) Standards

- ✓ Internal - What is the definitive number (rules of allocation)?

Online Giving for April		
Accounting Report	\$XXXX	Bank Deposit (less fees)
Online Report	\$YYYY	All online revenue
Donor DB Report	\$ZZZZ	Online donations less events

Example: Online giving is measured as total online donations minus any event related revenue

Reporting Needs

1) Standards

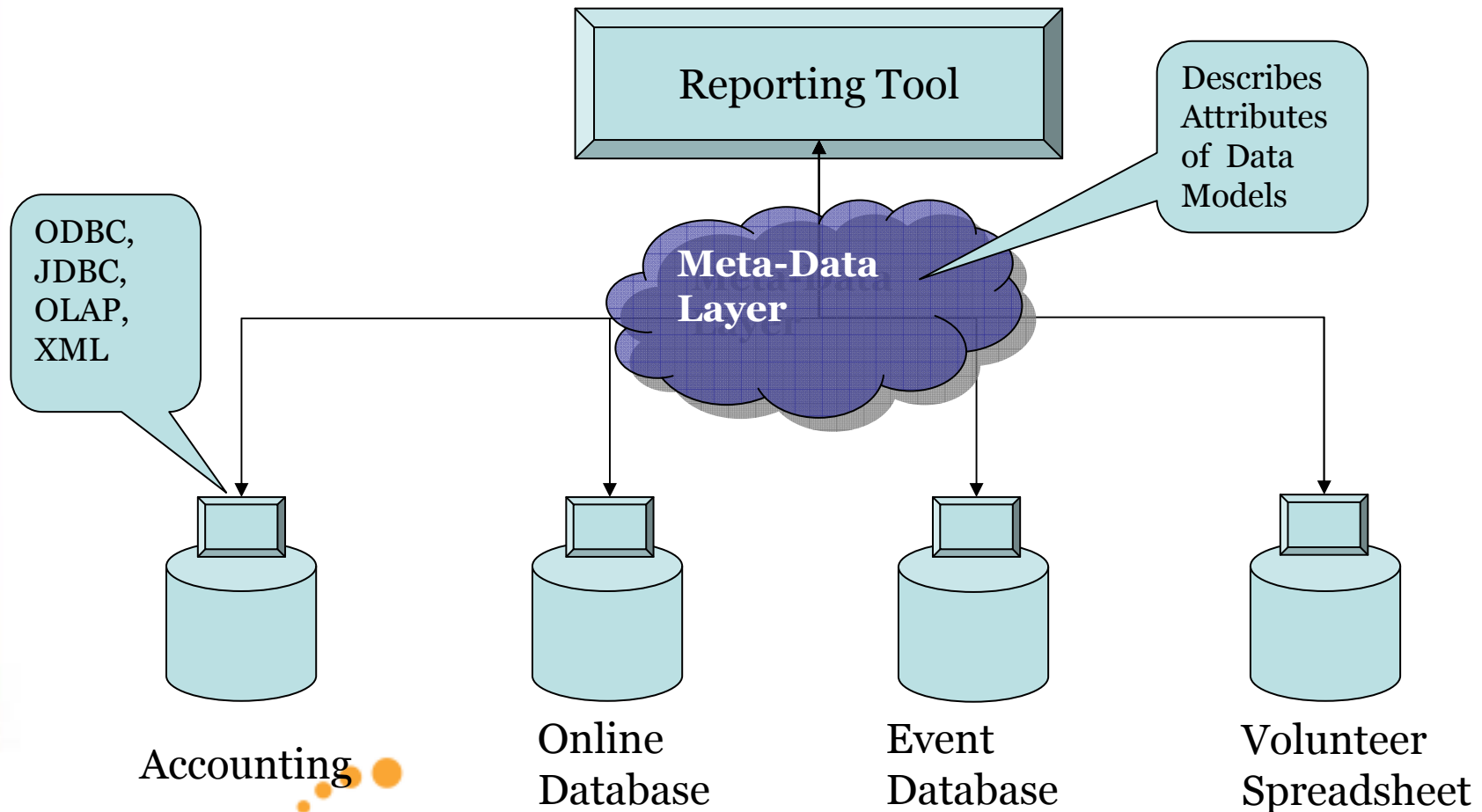
- ✓ External / Industry – Technical standards for data
 - Access – Comprehensive APIs
 - Format for Export – Eliminate proprietary data formats
 - Active Messaging Networks – XML Protocols

Many industries would not survive today without the above:
Airlines, Financial Institutions, Hotels, Movie
Theaters...even Pizza Delivery chains.

**This doesn't help you right now, but you should be an
advocate for it with your vendors and colleagues.
Remember, **you own your data and should have easy
access!**

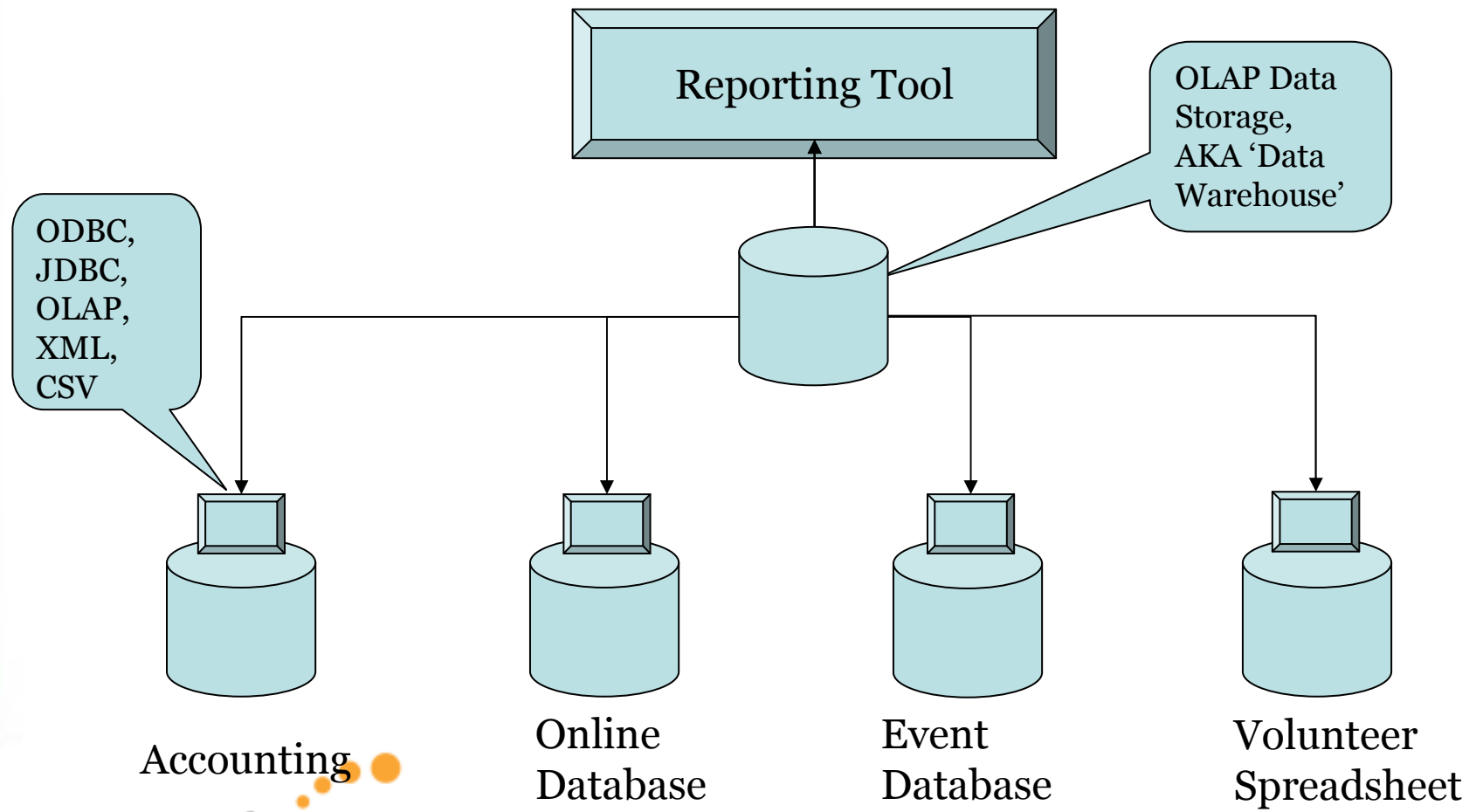
Reporting Needs

2) Platform Independent Tools: Model 1



Reporting Needs

2) Platform Independent Tools: Model 2



Reporting Needs

3) Empower End-Users

Step 3 of 5: Select report content

Report Wizard

Select the fields to display

Field Groups

- Contact Details
- Demographic Information
- Miscellaneous Information
- Gift Information
- Payment Information
- Acknowledgment Information
- All Fields

Fields

- Contact Details
- Demographic Information
- Miscellaneous Information
- Gift Information
- Gift Reference Number
- Gift Amount
- Payment Information
- Acknowledgment Information

Selected Fields

Field	Sort Order	Group By	Count	Maximum	Minimum	Sum	Average	Buttons
Account Manager Name	Asc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	Asc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition Name	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization Name	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Available Items

- Customers: Address Line 1, Address Line 2, City, CONTACT first name, CONTACT last name, Country, Cell Limit, Country Name, Customer Number, Phone, Postal Code, State, Territory
- Order Items: Order Number, Item Code, Quantity Ordered, Price Each, Price Outside
- Orders: Company, Order Date, Order Number, Required Date, Shipped Date, Status
- Products: Cost, MSRP, Product Description, Product Code, Product Size, Quantity in Stock

Selected Items

- Group: Level 1 [drag item here], Level 2 [drag item here]
- Order: Order
- Item: [drag item here]

Buttons: Review as HTML, Cancel, Back, Forward, Save, Save as New, Cancel

Report Data Report Format Report Content Report Criteria Save Report

Page 1 of 14

the guru

Constituents & Gifts Custom Report

Account Manager Name	Account Number	Recognition Name	Organization Name	Donation Date	Gift Amount
Borden, Katherine					

Buttons: Help, OK

Crystal Report Gallery

- Create a New Crystal Report Document
 - Using the Report Expert
 - As a Blank Report
 - From an Existing Report
- Choose an Expert
 - Standard
 - Form Letter
 - Form
 - Cross-Tab
 - Subreport
 - Mail Label
 - Drill Down

Guides the creation of a typical report.

Are there other needs you see?

Are there questions around the
'platform independent' models?



Current Options

1) **Data Warehouse Service Providers**

- Service based
- Costly
- Great business intelligence through cooperative databases, wealth overlays, lifestyle overlays, etc.

2) **Build your own data warehouse**

- Requires expertise to build and maintain
- Costly
- You retain full control and flexibility

3) **Acquire a platform independent reporting tool**

- Need to create 'views' into data
- Moderately priced
- Allows end user report creation and drill down

What is it Worth?

Reporting Cost Calculator		Examples	
Annual Salary		\$40,000	\$60,000
Divided by Annual Work Hours	1920	1920	1920
Equals Hourly Rate		\$20.83	\$31.25
Multiply by Time Invested in Reporting		150	150
Total Cost of Reporting	\$??????	\$3,125.00	\$4,687.50

What are the Time Savings?

Time Invested in Enterprise Reporting		Savings Per Report	Savings Per Year
Data Extraction	1-3 hours	1-3 hours	12 – 36 hours
Data Consolidation	1-3 hours	1-3 hours	12 – 36 hours
Data Reconciliation	2-5 hours	1-3 hours	12 – 36 hours
Data Presentation	1-3 hours	1-2 hours	12 – 24 hours
Total Time	5-14 hours	4 – 12 hours	48 – 132 hours
Total Cost (\$50k annual salary)	\$130 - \$364	\$104 - \$286	\$1,248 - \$3,432

What is the Upside?

- ✓ Time freed to focus on strategic **mission achieving or revenue generating activities**
- ✓ Better reporting that allows **faster more informed decisions**
- ✓ **Higher morale** as people focus on high impact activities over the tedium of reporting

Using Current Practice More Efficiently

- ✓ Schedule reports to run overnight, during lunch or meetings, etc.

Using Current Practice More Efficiently

- ✓ Schedule reports to run overnight, during lunch or meetings, etc.
- ✓ Consolidate your data in a 'living' spreadsheet maintained over months and years

	2006	2007												2008													
	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
IT - Connect Forward Mail/Fax/Traffic																											
Website Visitors	12,000	2,300	1,800	1,800	2,100	1,700	1,800	2,200	2,300	2,500	2,200	2,200	2,200	2,200	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	
Multi-Touch Mail/Change	N/A	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%	120%
New-Old Year Change	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Average monthly cost per user	16.42	5.47	5.27	5.32	4.93	5.75	5.36	4.17	5.04	3.77	4.33	4.48	3.57	2.44	4.16	3.57	4.10	4.10	4.10	4.10	4.10	4.10	4.10	4.10	4.10	4.10	
IT Search Engine Optimization																											
Connect Score from "This Address"	46.40%	31.20%	30.80%	30.80%	37.40%	35.10%	36.40%	34.50%	43.50%	43.50%	43.50%	47.50%	36.50%	34.70%	43.20%	41.40%	44.50%	46.00%	41.30%	44.70%	44.70%	44.70%	44.70%	44.70%	44.70%	44.70%	
Connect score from "Search Engine"	3.80%	4.40%	5.30%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	5.20%	
Local Flight Maps (price average)	N/A	25.40	21.37	26.10	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	1,950.00	
IT Organic Online Conversion Rates																											
New Organic Registrations	N/A	500	60	67	77	40	37	46	176	108	416	56	149	104	103	141	94	176	141	106	106	106	106	106	106	106	
Organic Email Clickthrough Rate	61.37%	4.57%	3.44%	3.24%	3.27%	3.28%	3.41%	3.45%	3.45%	3.75%	3.88%	3.75%	4.28%	3.45%	3.50%	4.20%	3.77%	3.47%	3.69%	3.69%	3.69%	3.69%	3.69%	3.69%	3.69%	3.69%	
IT Newsletter Health																											
Open Rate	N/A	26	320	337	407	443	461	488	497	729	807	860	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	1,036	
Click Rate	N/A	36	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34	34
Click Date	N/A	47	51	57	60	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	
Unlink File	N/A	2,428	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	
Total Revenue	2,428	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	3,412	
Unlink as a % of Total Revenue	N/A	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	
IT Newsletter Communication																											
Delivery Cost	N/A	N/A	N/A	N/A	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	6500	
Deliverability	N/A	N/A	N/A	N/A	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
Open Rate	N/A	N/A	N/A	N/A	27	1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	
Click Rate	N/A	N/A	N/A	N/A	12	2	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	
Unlink Date	N/A	N/A	N/A	N/A	600	611	609	611	609	611	609	611	609	611	609	611	609	611	609	611	609	611	609	611	609	611	
Unlink Date Rate	N/A	N/A	N/A	N/A	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	
Unlink Clickthrough Rate	N/A	N/A	N/A	N/A	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	
Unlink Revenue	N/A	N/A	N/A	N/A	6	6	11	7	20	11	6	12	6	6	6	6	6	6	6	6	6	6	6	6	6	6	
Unlink Revenue Rate	N/A	N/A	N/A	N/A	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	
IT Fundraising																											
Monthly Donations	\$	16,676	\$	14,113	\$	17,249	\$	13,824	\$	18,809	\$	14,100	\$	11,888	\$	20,269	\$	21,215	\$	28,269	\$	24,215	\$	28,269	\$	24,215	
Monthly New Donors	N/A	20,000	18,750	18,750	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	26,000	
New-Old Year Change	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Number of Donations per month	58	58	26	36	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	58	
Average Donation/Donor	\$	283.36	\$	540.71	\$	527.16	\$	270.31	\$	324.33	\$	244.83	\$	203.87	\$	351.17	\$	387.17	\$	497.17	\$	387.17	\$	497.17	\$	387.17	
Unlink Revenue	1.21	1.08	1.12	1.11	1.08	1.10	1.11	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	1.10	1.08	
IT Website File Performance																											
Website File Size	47	51	54	54	56	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	59	
Website File Type	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	
New-Old Year Change	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	

Using Current Practice More Efficiently

- ✓ Schedule reports to run overnight, during lunch or meetings, etc.
- ✓ Consolidate your data in a 'living' spreadsheet maintained over months and years
- ✓ Focus on simplicity and key high-level metrics.

Objective	Metric	Strategy	Metric	Tactic	Metric
Revenue	Total Net Income	Online Acquisition	New online donors	Special Offer	Conversion Rate
Participation	Event participants	P2P Invitations	New participants from P2P	Facebook App	Downloads

Using Current Practice More Efficiently

- ✓ Schedule reports to run overnight, during lunch or meetings, etc.
- ✓ Consolidate your data in a 'living' spreadsheet maintained over months and years
- ✓ Focus on simplicity and key high-level metrics.
- ✓ Do not reconcile data you do not have to

Online Giving for April		
Accounting Report	\$XXXX	Bank Deposit (less fees)
Online Report	\$YYYY	All online revenue
Donor DB Report	\$ZZZZ	Online donations less events

Using Current Practice More Efficiently

- ✓ Schedule reports to run overnight, during lunch or meetings, etc.
- ✓ Consolidate your data in a 'living' spreadsheet maintained over months and years
- ✓ Focus on simplicity and key high-level metrics.
- ✓ Do not reconcile data you do not have to
- ✓ Create reusable templates for your presentation that allow you to simply drop in new data

Next Steps

- ✓ Calculate time and cost involved in reporting currently
- ✓ Educate internally on reporting costs, both in time and opportunity cost
- ✓ Evaluate options for reporting across systems
 - ✓ Compare current cost with potential cost savings
 - ✓ Determine if timeliness could have a material impact
 - ✓ Weigh the importance of end-user empowerment
- ✓ Advocate for standards to make reporting easier
- ✓ Remember, this is an on-going challenge. Be adaptable and share your learning through NTEN!

Questions?

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