



Data strategies and cake

2 February 2022



@AdaptaforNFP

About Adapta

Adapta Consulting is an independent consultancy working exclusively with organisations in the not-for-profit sector.

We specialise in information systems where our consultants have helped a broad range of charities make the right choice and go on to a successful implementation. We are completely independent, which means that we evaluate all the options for change on their merits and we have no stake in any particular outcome.

Contact us

We would love to have a further chat with you.

Give us a call on: 020 7250 4788

Or drop us an email: hello@adaptaconsulting.co.uk



Our speakers

Sam Kilgariff

Insight Manager, Practical Action



Hayley Perez

Head of Individual Giving, JDRF



Keith Collins

Principal Consultant, Adapta Consulting



Today's programme

- 14:00 **Arrival and welcome**
Keith Collins, Adapta Consulting
- 14:05 **Data management for non-profits – what's occurring**
Keith Collins, Adapta Consulting
A short overview of some of the trends and innovations in data management that are now being used by organisations large and small in the non-profit sector
- 14:20 **Case study**
• Hayley Perez, JDRF
- 14:40 **Case study**
• Sam Kilgariff, Practical Action
- 15:00 **Discussion & feedback**
Breakout discussions and feedback
- 15:45-
16:00 **Review & Close**

Housekeeping – interruptions are possible



Rules of Engagement!

- 'Share screen' should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to the speaker presentations, please submit these at any time using the Chat feature.** Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We'll be sharing the Adapta slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

Data – lots and lots of data

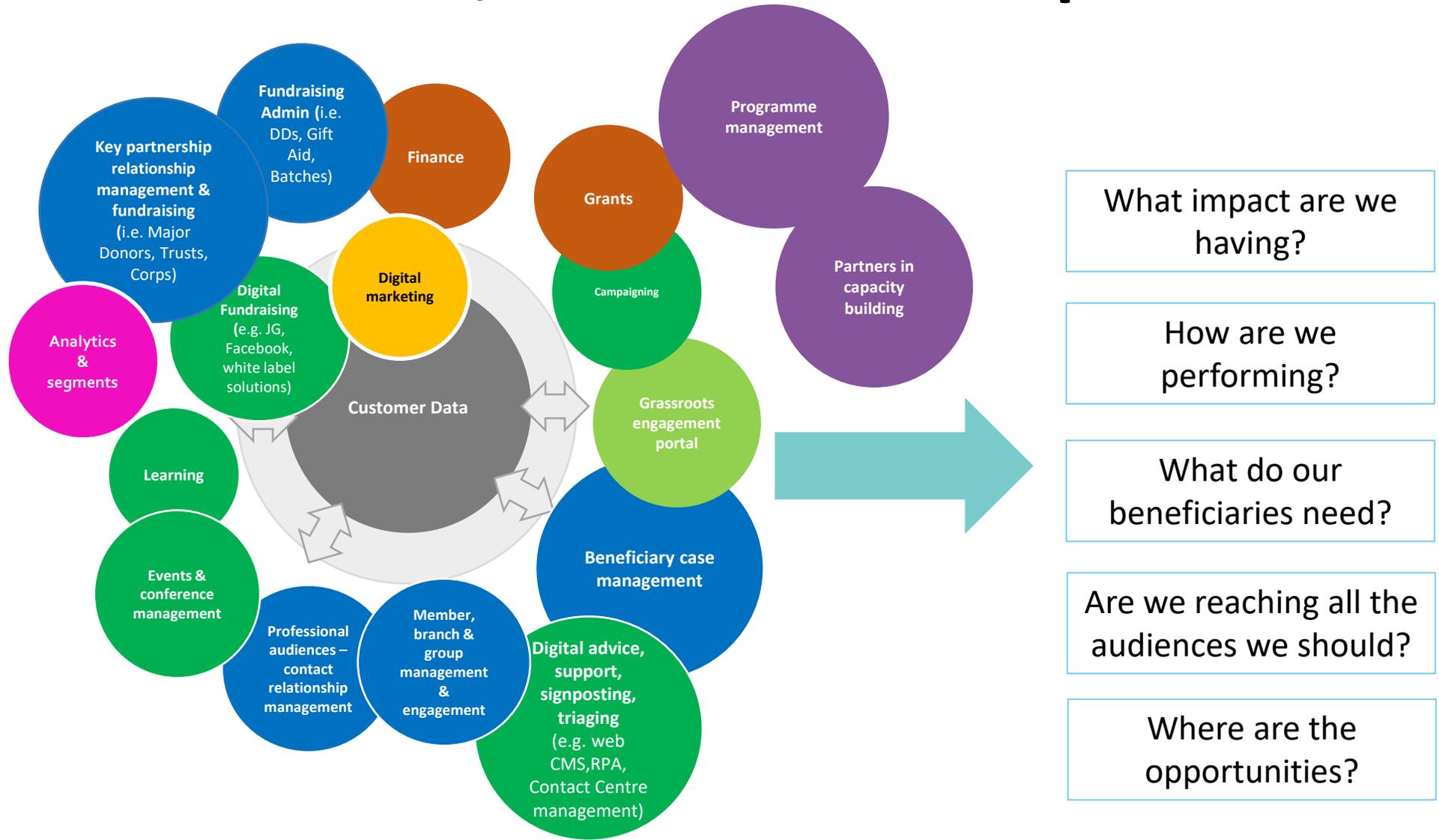


“The world is already awash with data—and the ferocious pace of its creation shows no sign of slackening. IT market research firm IDC estimates the amount of data stored in 2020 at 59 zettabytes (that’s 59 followed by 21 zeros). It predicts that **the next three years of data creation will exceed that of the previous 30 years combined.**”

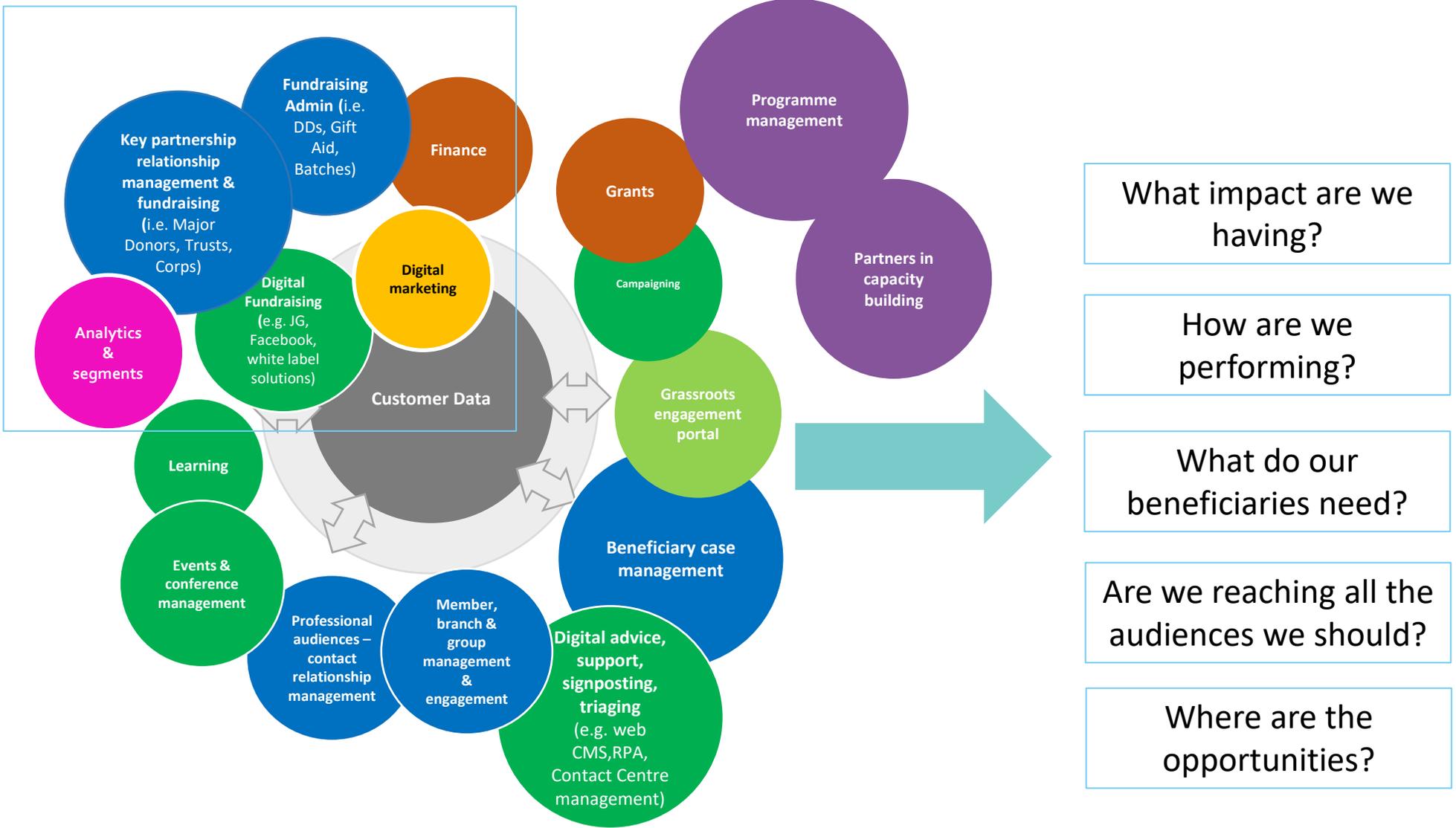
Data Evolution in the Cloud, the Lynchpin of Competitive Advantage.

Economist Intelligence Unit, May 2021

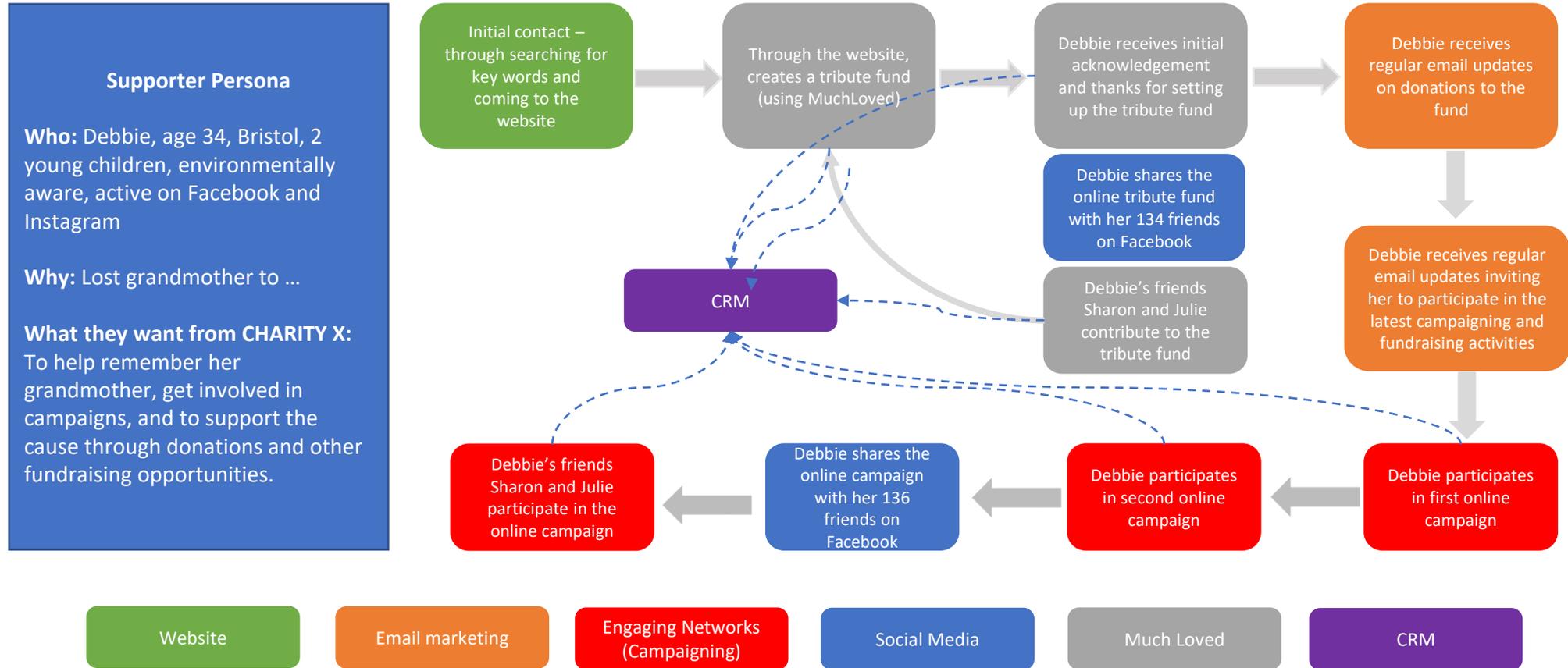
All sorts of data, from all sorts of places...



Let's just take a closer look here...



The 'data' behind a supporter experience



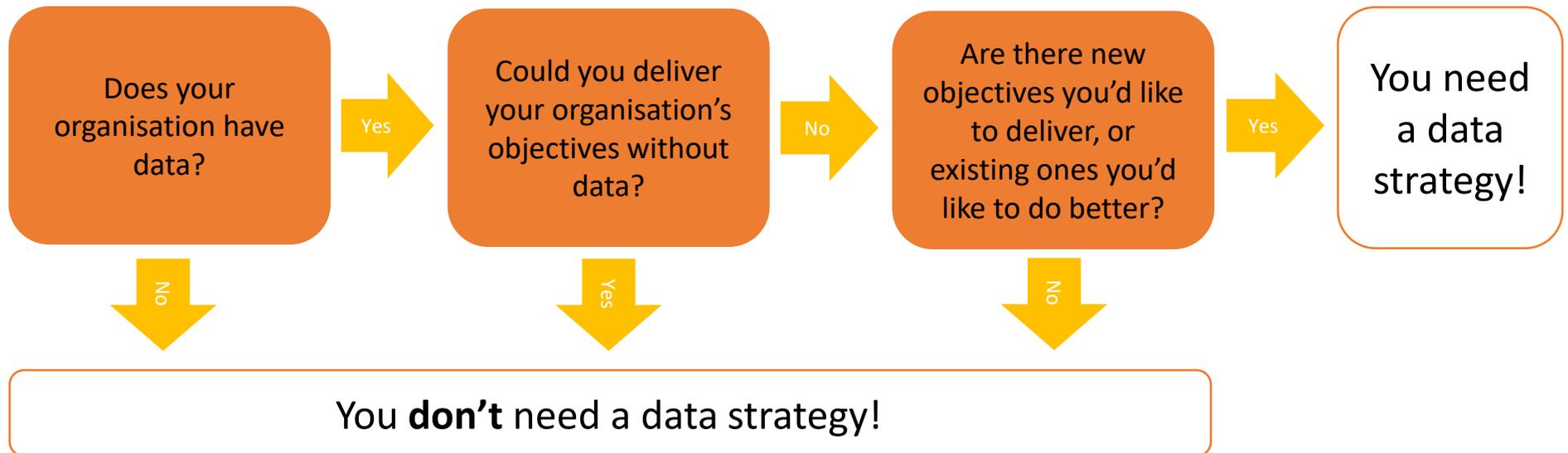


Debbie is creating the data **herself** – setting up a tribute fund, sharing it with her friends via social media and emailing her MP



How do we get to grips with it all?

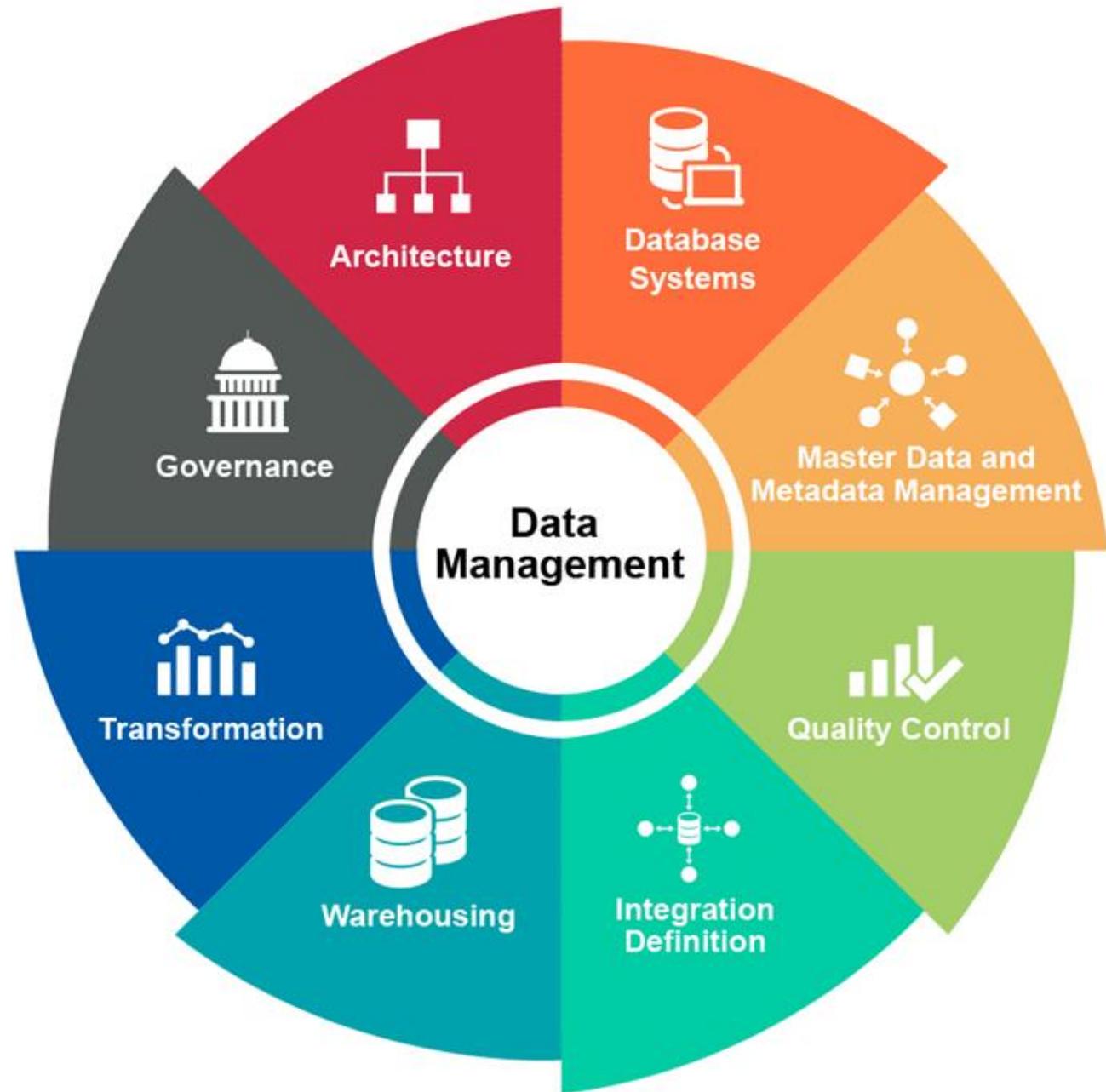
Do you need a data strategy?



Data Strategy Building Blocks



**Where do
we
'manage'
data – in
technology
terms?**



Data governance

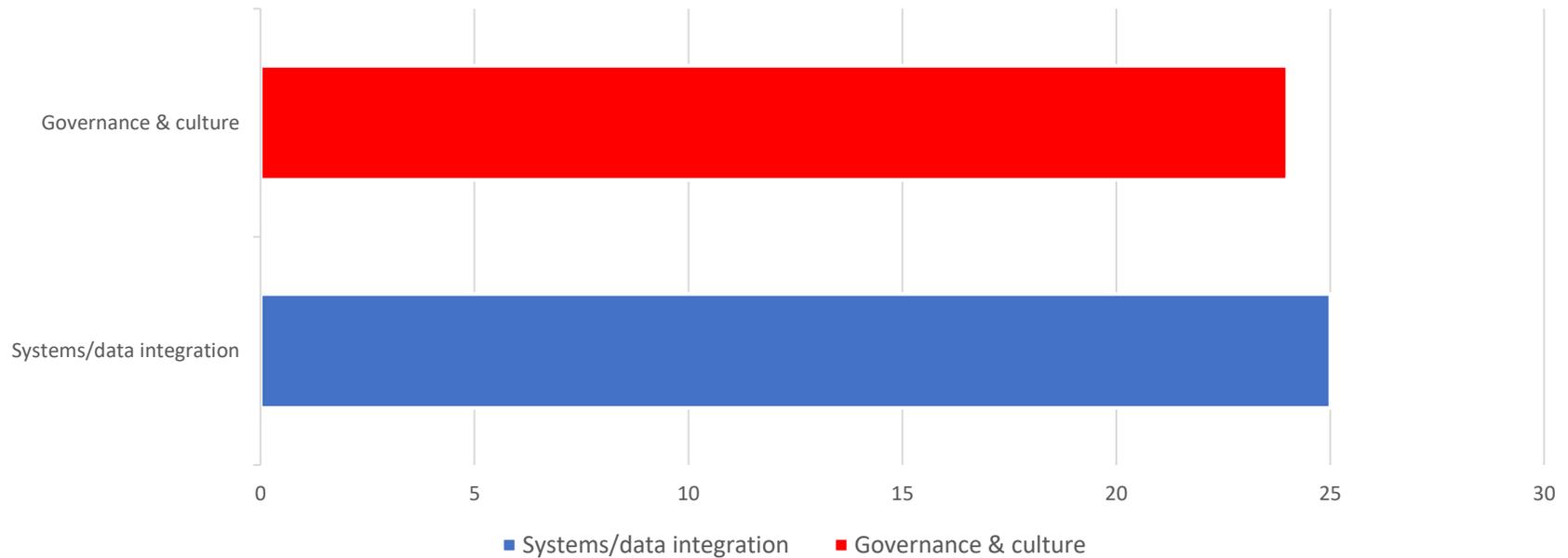
Data governance encompasses the people, processes, and information technology required to create a consistent and proper handling of an organisation's data across the organisation. It provides all data management practices with the necessary foundation, strategy, and structure needed to ensure that data is managed as an asset and transformed into meaningful information

How do we organise ourselves to manage data better?

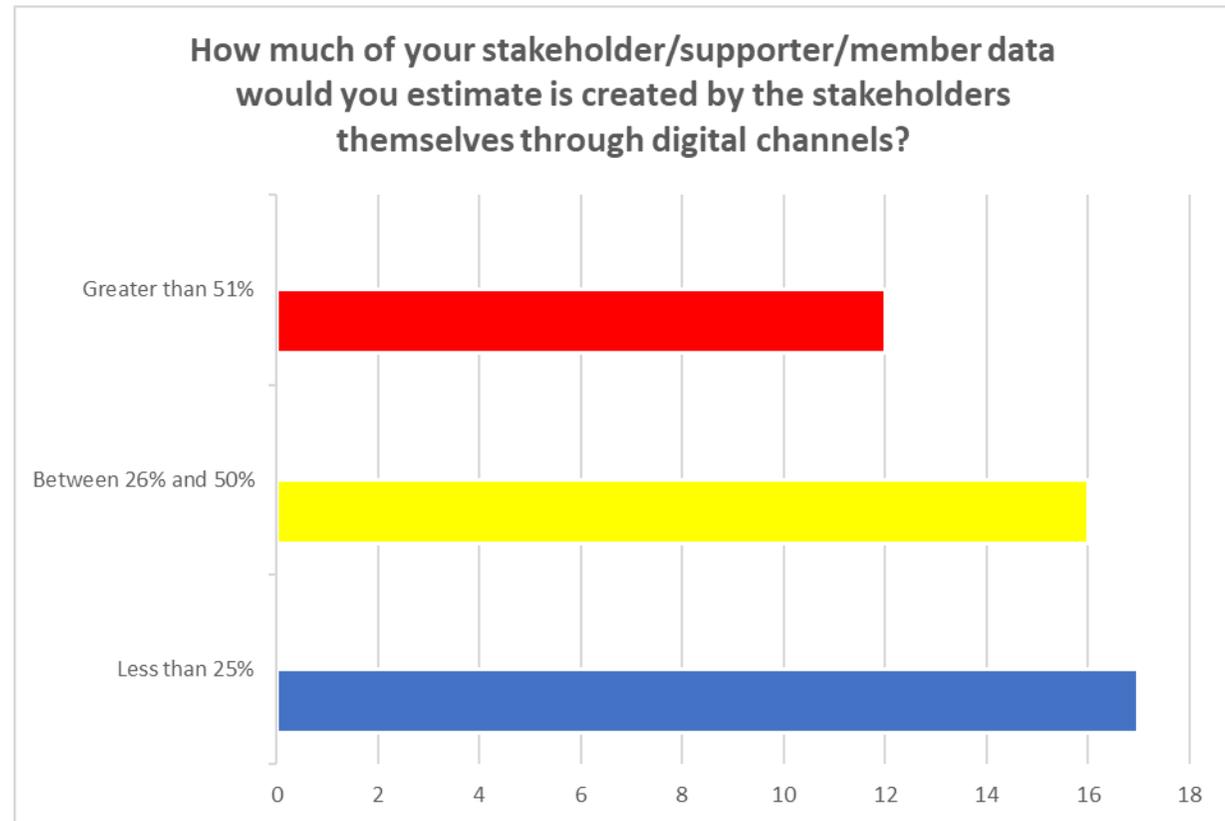
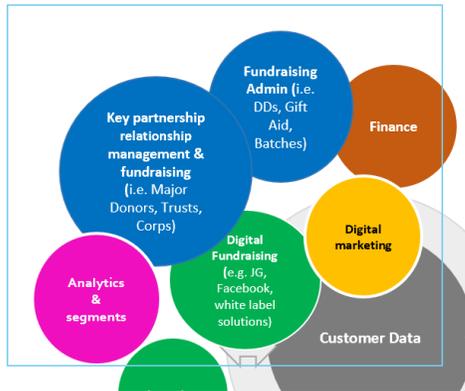


Our survey asked...

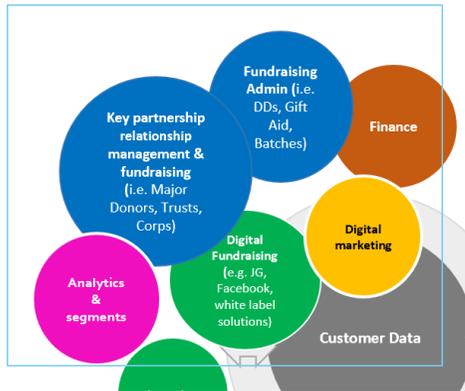
What is your biggest challenge with data?



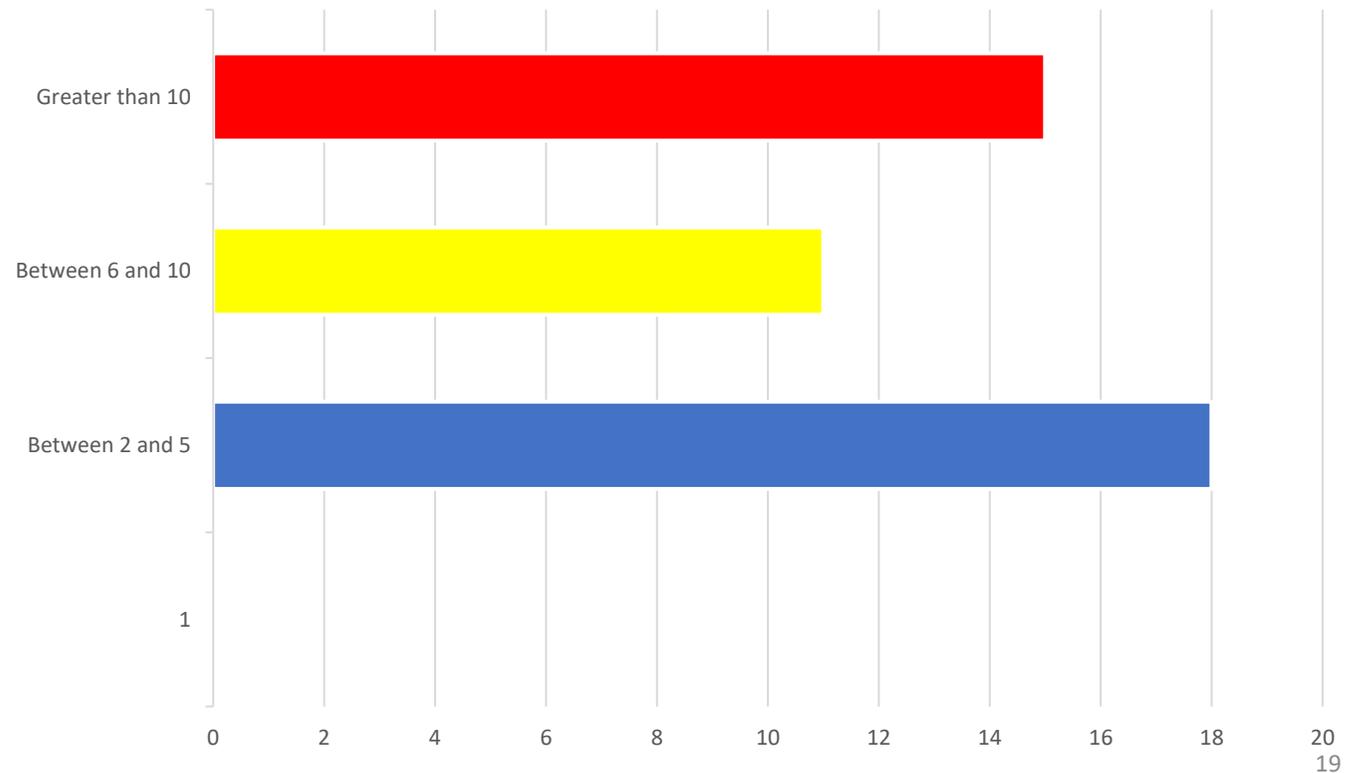
With this particular areas of focus in mind...



With this particular areas of focus in mind...



How many different sources of stakeholder/supporter/member data would you estimate that you have?





**Case studies –
journeys others
are going on...**

Our speakers

Hayley Perez

Head of Individual Giving, JDRF





DATA STRATEGY

HAYLEY PEREZ

Feb 2022

A photograph of a man with light brown hair and a beard, wearing a blue button-down shirt, smiling broadly while carrying a young child with blonde hair on his shoulders. The child is wearing a colorful patterned shirt and is laughing joyfully. The background is white with a large, irregular blue brushstroke graphic on the left side.

INTRODUCTION

JDRF - the type 1 diabetes charity

- Research, advocacy & support
- £6m annual income
- 30-40,000 active contacts / 20,000 active supporters
- Major Donor, Corporate, Events, Community Fundraising & Individual Giving



STARTING OUT

Challenges

- Clunky processes – loading & pulling data, income processing & reconciliation
- Platforms & systems not connected
- Manual supporter journeys & stewardship
- Data quality
- Reporting

Approach

- Better use of data and digital
- Invest £ wisely
- Lay the foundations
- Take the organisation with us
- Cross-org colab – understanding that data and digital isn't just the remit of one team
- External support

VISION

Our vision is a future where we **use data as an enabler to drive our organisation forward**. Where we have **good quality data and infrastructure and processes** that ensure continued data integrity; where **data is used to drive decisions** across the organisation, from senior management strategy to individual projects; **data is trusted and the organisation understands its value**; across the organization we have access to donor intelligence that enables us to deliver **personalised, optimised supporter journeys and communications**; data is used by all parts of the organisation to make decisions; the organisation has **shared access to data**, and is able to innovate, test and learn to take advantage of new opportunities. We want to be able to communicate effectively with our supporters and to place them at the centre of how we communicate with them.

Learnings so far

1. CRM
2. Data Governance
3. Digital Engagement

And also...

- Organisational buy-in and support

The Future

- Donor insight - and our ability to act on it
 - Performance data
 - Staff time & focus
 - Build deeper relationships with our supporters
 - Extend our reach
-
- **Foundation for good fundraising**
 - **Raise more money = fund more research**



QUESTIONS?

Data Strategy

February 2022

Our speakers

Sam Kilgariff

Insight Manager, Practical Action



DATA STRATEGY & CAKE

Sam Kilgariff
Data & Insight Manager
2nd Feb 2022

Practical
ACTION

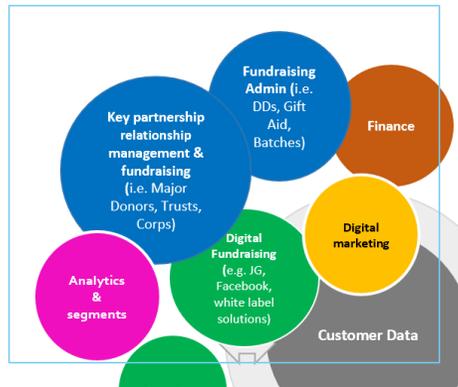


- International Development charity based in Rugby, Warwickshire.
- Operate across 7 offices throughout Africa, Asia and Latin America.
- In 2020/21 we:
 - Delivered 96 projects in 12 countries.
 - Impacting 16m people.
 - Received £30m income:
 - £11.5m donations and legacies.
 - £18.5m from grants and consultancy work.

Data architecture

FUNDRAISING AND

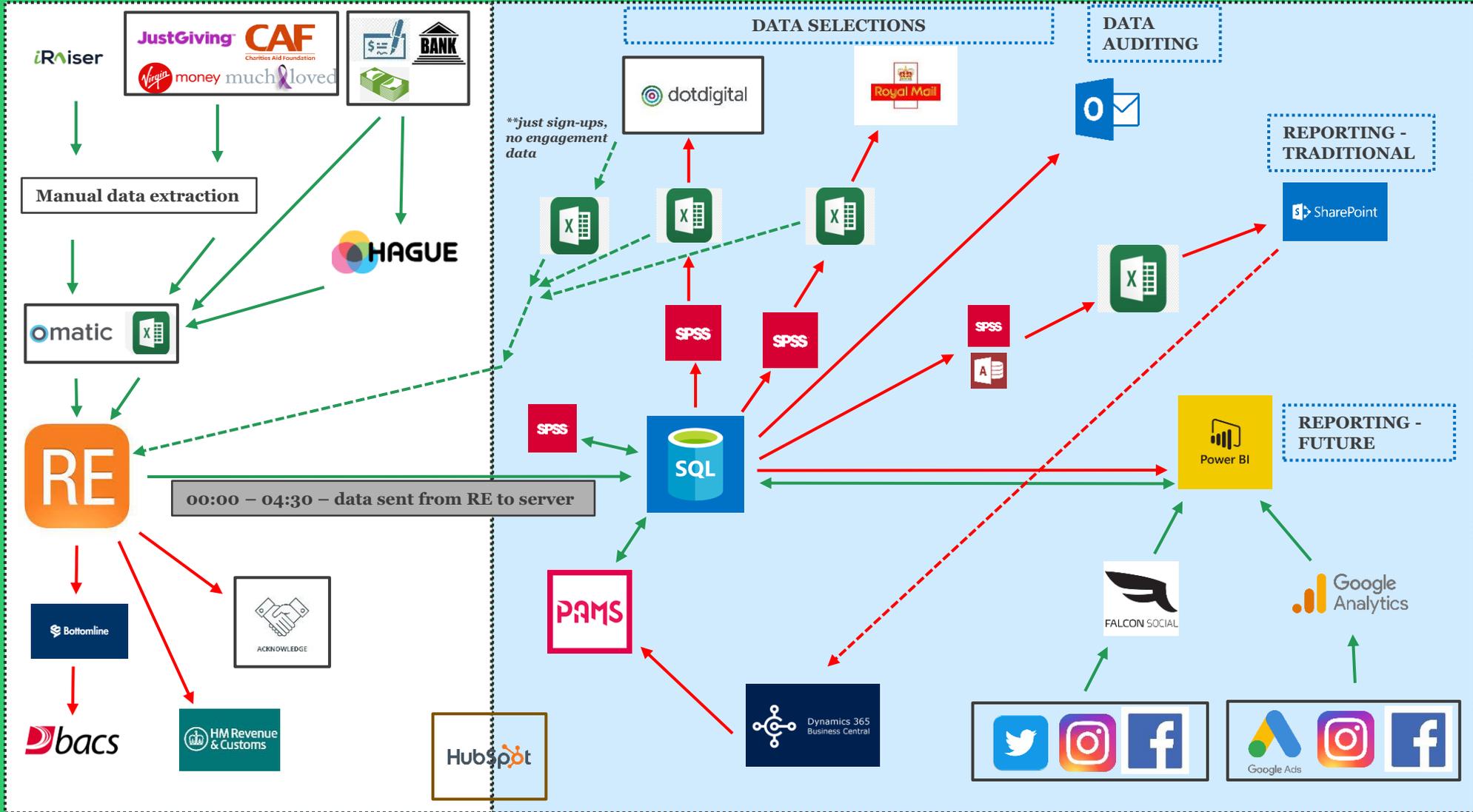
SUPPORTER EXPERIENCE



- The Raiser's Edge (classic, 7.96, on premise server).
 - IG and Philanthropy.
 - **Restricted fundraising – No CRM.**
- 3rd party **plug-ins** for fundraising admin e.g. Omatic, HMRC, BACS.
- **Manual** integrations / processes e.g. Dotdigital, online forms, data selections (SPSS).
- **SQL server data warehouse**, standardising data, for reporting and data selections, integrating data e.g. Google Analytics.

CRM

DATA MANAGEMENT



Why
CHANGE?

- Concerns around **longevity** of the current CRM product.
- Certain teams not using CRM due to concerns around the interface, and ease of training.
- Technical limitations. Automation/integration.
- Reliance on manual process, bespoke systems and niche skills e.g. data warehouse

We might need to replace our CRM product, but what about all of the systems that allow us to ‘do’ data? What do we want this to look like now, and in the future?

CRM Review – Phase 1
SUMMER 2020

- 3 month project, in collaboration with Adapta.
- Series of meetings with key stakeholders.
- **Data (including CRM)** Requirements gathering.
- What works well, what doesn't, and where are the gaps.
- **'options paper'** delivered by Adapta, summarising requirements and an overview of potential systems / approaches.

What do we
WANT?

- In terms of **CRM**:
 - What we do now, especially around fundraising admin.
 - Cloud-based, global reach, secure and granular access.
 - Simple system that colleagues can feel confident using, and train others.
- In terms of **data management**, we'd like:
 - Enhanced **integration** between systems e.g. website/email.
 - Enhanced **automation** capabilities e.g. supporter journeys, donation processing.
 - More powerful / robust tools for **ETL and data storage**. Less reliance on bespoke code / skills.

- Broadly, two options:
 1. Upgrade to **RE NXT CRM**, and build our **data management solution around it** with either our existing tools, or new ones.
 2. **Replace** our CRM system, and **consider changing all of the tools / systems** we currently rely on.

What would all of this look like? In reality? – phase 2

CRM Review – Phase 2
SPRING / SUMMER
2021

- Engagements with:
 - Blackbaud
 - 5 Microsoft partners
 - 2 Salesforce partners
- RFI/RFP process.
- Invitation for written summaries and virtual presentations.

What

DID WE LEARN?

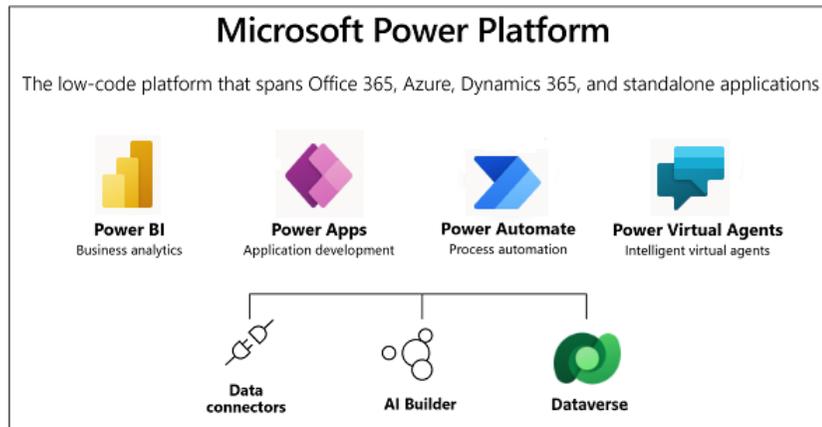
RE NXT

- Cloud hosting / global access.
- Fundraising admin covered.
- Relatively quick implementation process.
- CRM as source of truth. Build an architecture 'around the CRM'.
- Access to data would be different.
- Integration via 3rd party solutions.
- MS partnership? Strategy for NXT here?
- Long-term (15 year) solution?



Microsoft

- Dataverse.
- MSD Marketing & Sales
- Data lakes.
- Integration / automation / reporting / segmentation via **power platform**



What
NEXT?

- Discussions currently ongoing with senior leaders at pA.....

Things to consider:

- **Organisational appetite for a large scale technology change project.**
- **Long / short term view to investment in CRM and data management.**
- **Available resources.**

**Thank
YOU**

Sam Kilgariff

Insight Manager

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Breakout sessions will discuss:

What do we know – and don't know – about the technology to support future data needs?

What new skills and/or experience might we need within our teams to be able to implement new approaches to and opportunities with data?

Breakout Room Discussions



Poll, Thanks & Goodbye!

Upcoming events

CRM and Cake XI – 16 March, 2pm.

www.adaptaconsulting.co.uk/adapta-events

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