

Welcome to today's webinar

# **Streamlining your data to make it work better for your alumni, fundraising and marketing efforts**

*The webinar will start shortly*



# We're passionate about data!



**Sam Bellringer**, Data Director at ToucanTech  
Former Development Manager and Database  
Manager at Mill Hill School and Harrow School



**Kate Jillings**, Co-Founder at ToucanTech  
Former corporate marketer and director of  
consumer data company TruRating

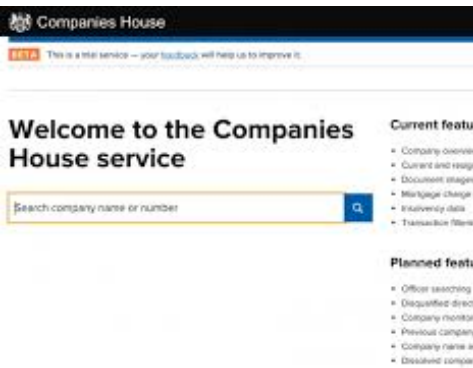


# What we'll cover in this webinar

- ★ Are you storing too much data, in too many places?
- ★ Walk-through of 4 potential donors - what to consider when logging info
- ★ Think about tagging now so that you can find people later
- ★ Decide your marketing strategy first and ensure that the data you collect compliments and assists your strategy
- ★ The power of automated data and pipelines
- ★ Some data basics, GDPR and final tips



# Storing everything!



# Where's all the data hiding?



# Two ways to use a database

- 1** To look up an individual and read what's stored on their record (assuming everything about this person is stored in one place – not always the case!)
- 2** To filter or report on groups of individuals according to specific criteria (data must be quantised and consistent)



When streamlining, take into account both approaches



# Example: four HNWI



Jim



Helen



Richard



Anita

How might their data have been captured in a database?



# Jim



- ★ Appeared in Sunday Times Rich List worth £700m
- ★ Has never been in touch with the school
- ★ You make a note on record with note type of 'prospect note'





# Helen



- ★ Elderly widow who lives in an expensive road in Hampstead
- ★ Indicated in a letter that she's considering a gift to the School
- ★ You upload pdf of letter in to her communication history
- ★ Possibly add a pledge record



# Richard



- ★ Email signature in his latest correspondence says he is a Managing Director at Barclays Investment Bank
- ★ You create a work record for him in the database detailing his position



# Anita



- ★ Identified by a third-party wealth mining company you used in the past in a wealth band of £10m+
- ★ This information was provided in a separate wealth mining report
- ★ You give her a category / attribute saying 'Wealth-Mining Research 2016'
- ★ Her children left the School 5 years ago



# How to extract this group PMDs?

Useful information in each individual record:



Jim



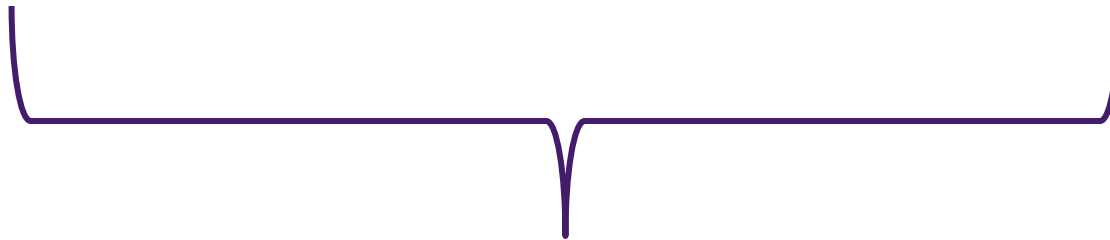
Helen



Richard



Anita



How to extract these four people in a group of potential major donors?



# Wealth & warmth

In development, most of us tend to think about two things

1. A person's ability to give a lot of money (wealth)
2. A person's likelihood to give that money (warmth/ affinity)



# Use tags/ flags/ defined fields

Jim –

Major Donor Prospect Level 10

Affinity Level 0

Helen –

Major Donor Prospect Level 4

Affinity Level 9

Legacy Prospect

Richard –

Major Donor Prospect Level 6

Affinity Level 6

Anita –

Major Donor Prospect Level 9

Affinity Level 1

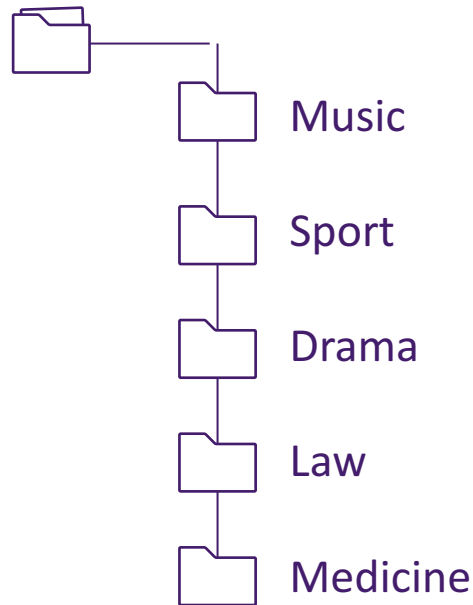
(if you keep this data)



# Categorise across all areas

Interests and hobbies

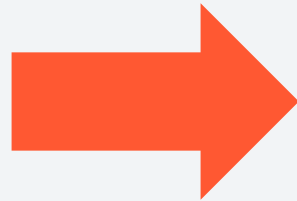
Professional career information



# Streamline

Instead of this:

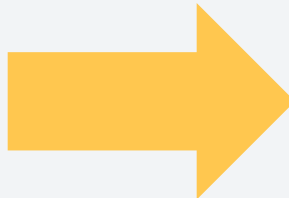
**Collect  
everything**



**Decide marketing strategy based  
on the data we can extract**

Try this:

**Decide marketing  
(fundraising) strategy**

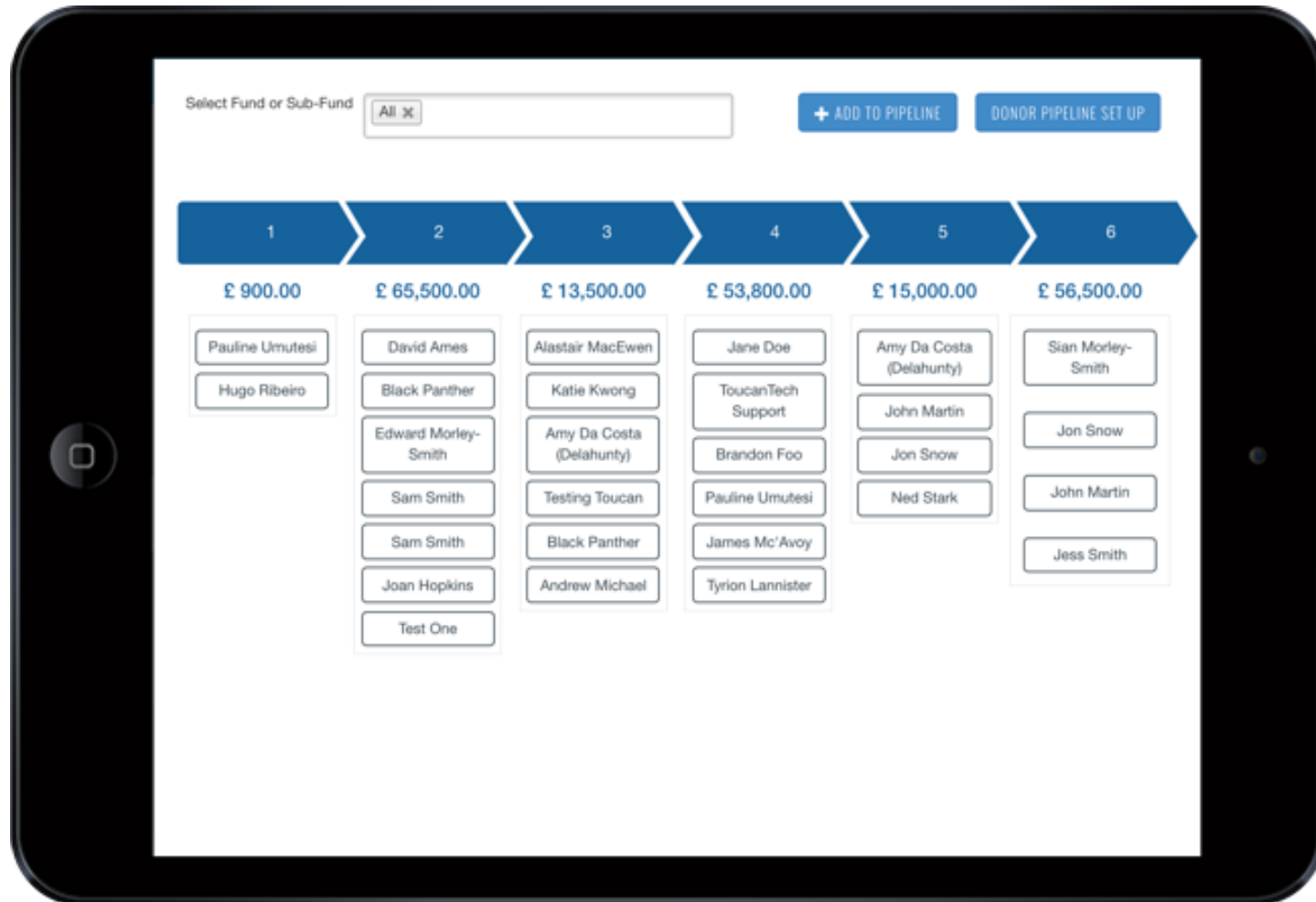


**Collect data needed to  
execute your strategy**

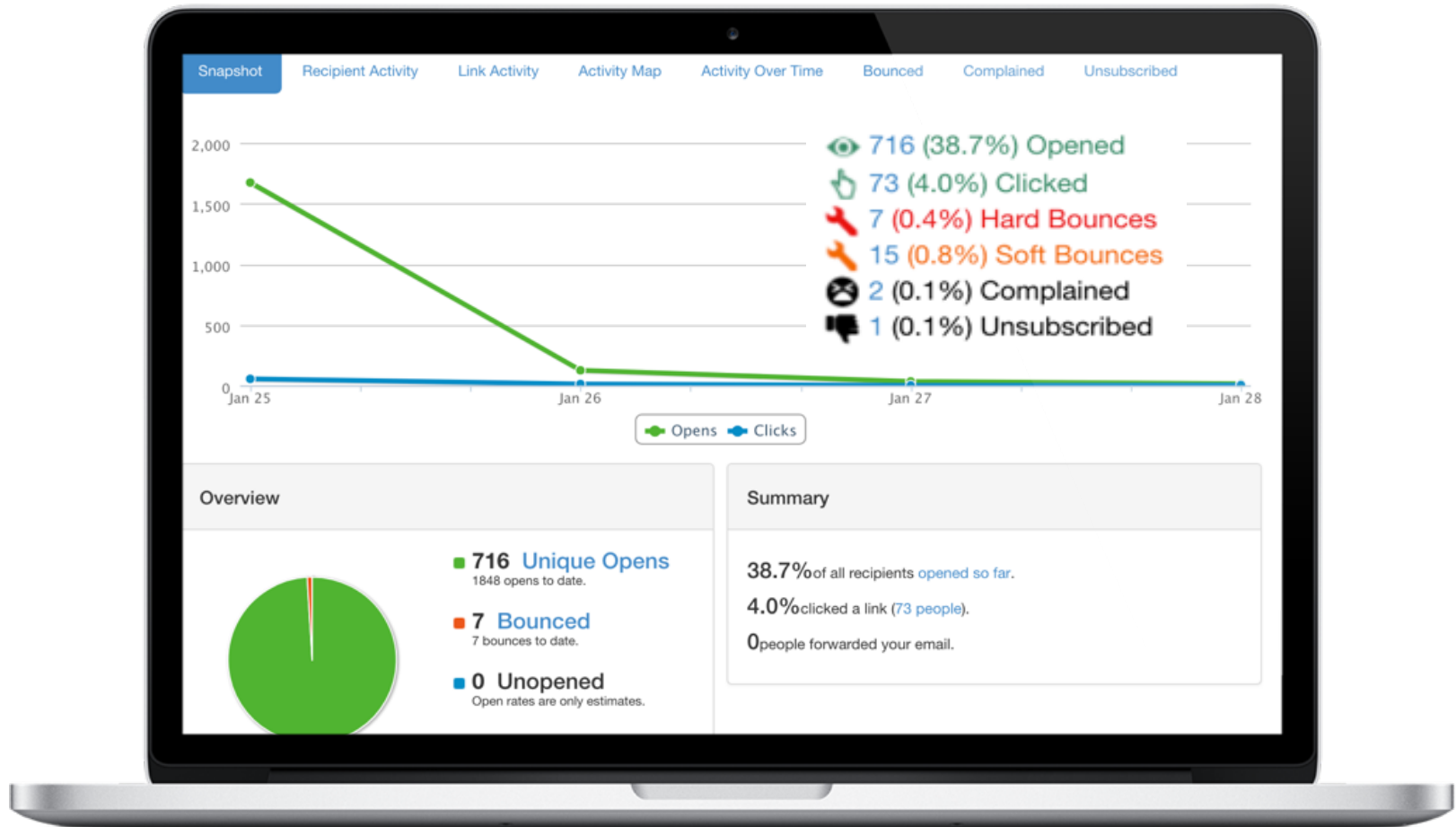




# Have you considered a pipeline?



# Are you collecting automated data?



# Some data basics to finish off!

What do you have?

Why are you keeping it?

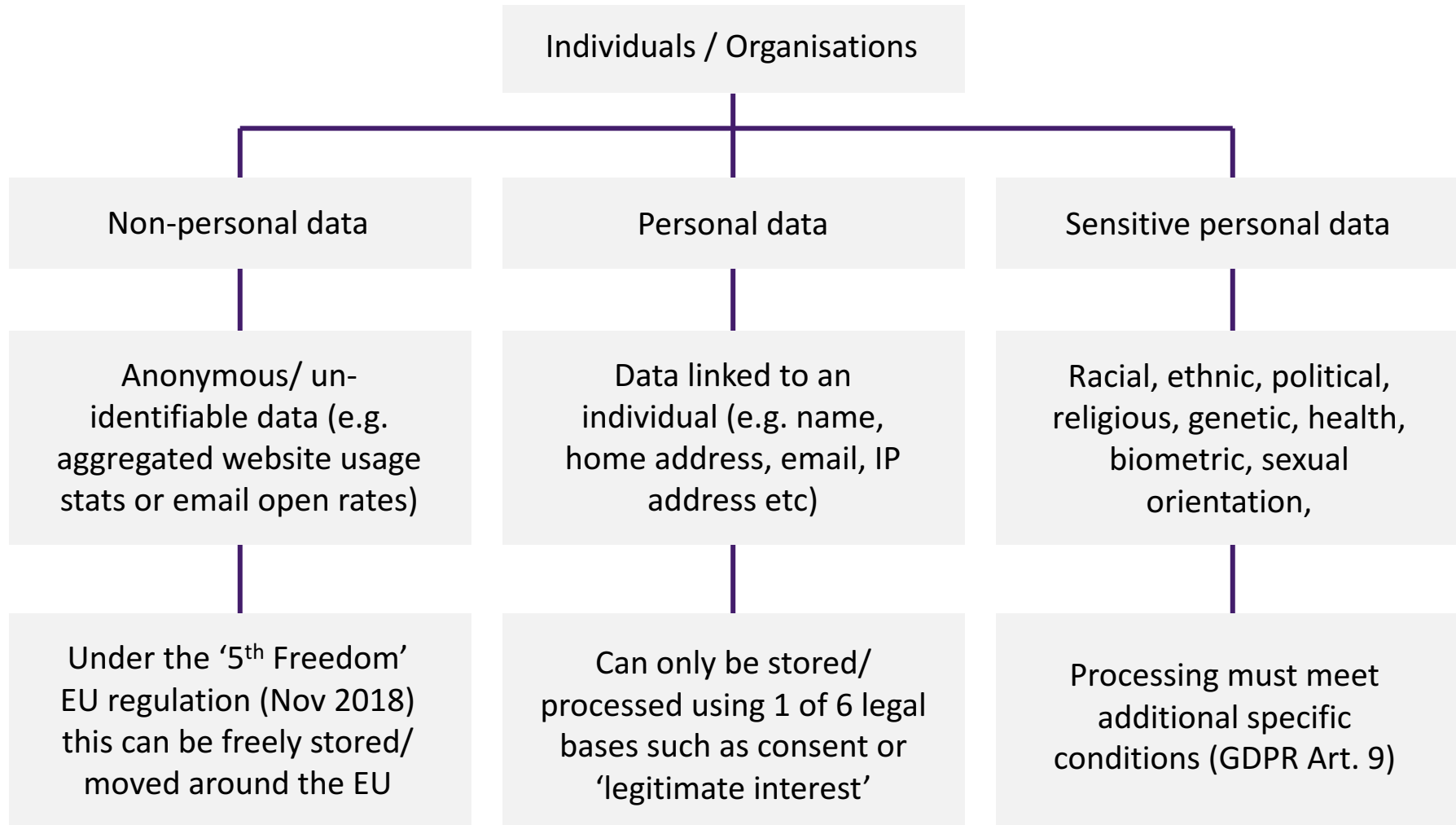
What do you need?

How to enter it in to your database

Why to keep everything in one place



# What data do you have?



# Know your data!

- ★ How many records?
- ★ What fields of information ?
- ★ How did you collect the data?
- ★ When did you collect the data?
- ★ What legal basis are you using?
- ★ If using consent as your legal basis, when and how was consent captured and do you have evidence?
- ★ How accurate is the data? Quality and reputability?
- ★ Data cleanliness/ duplication?

Can you confidently answer every question?



# Why are you keeping it?

Does the data you have serve a purpose today? In the future? What are you actively using the data for and how does it help your institution?

If no longer used, you should securely delete it (GDPR principle of 'data minimisation')

## GDPR Checklist

*ICO website,  
Jan 2019*

- ☐ We know what personal data we hold and why we need it.
- ☐ We carefully consider and can justify how long we keep personal data.
- ☐ We have a policy with standard retention periods where possible, in line with documentation obligations.
- ☐ We regularly review our information and erase or anonymise personal data when we no longer need it.
- ☐ We have appropriate processes in place to comply with individuals' requests for erasure under 'the right to be forgotten'.
- ☐ We clearly identify any personal data that we need to keep for public interest archiving, scientific or historical research, or statistical purposes.



# Collect the data you need for your goals



e.g. your goal is to build a powerful professional/ careers network

- ✓ Years work experience
- ✓ Courses/ degrees
- ✓ Industries
- ✓ Functions
- ✓ Locations
- ✓ Willingness to 'mentor'
- ✓ Careers volunteer



e.g. your goal is to build an engaged alumni and parent base for friend-raising

- ✓ Comms history
- ✓ Email open / click rates
- ✓ Events attendance
- ✓ Visits/ meetings
- ✓ Relationships
- ✓ Notes



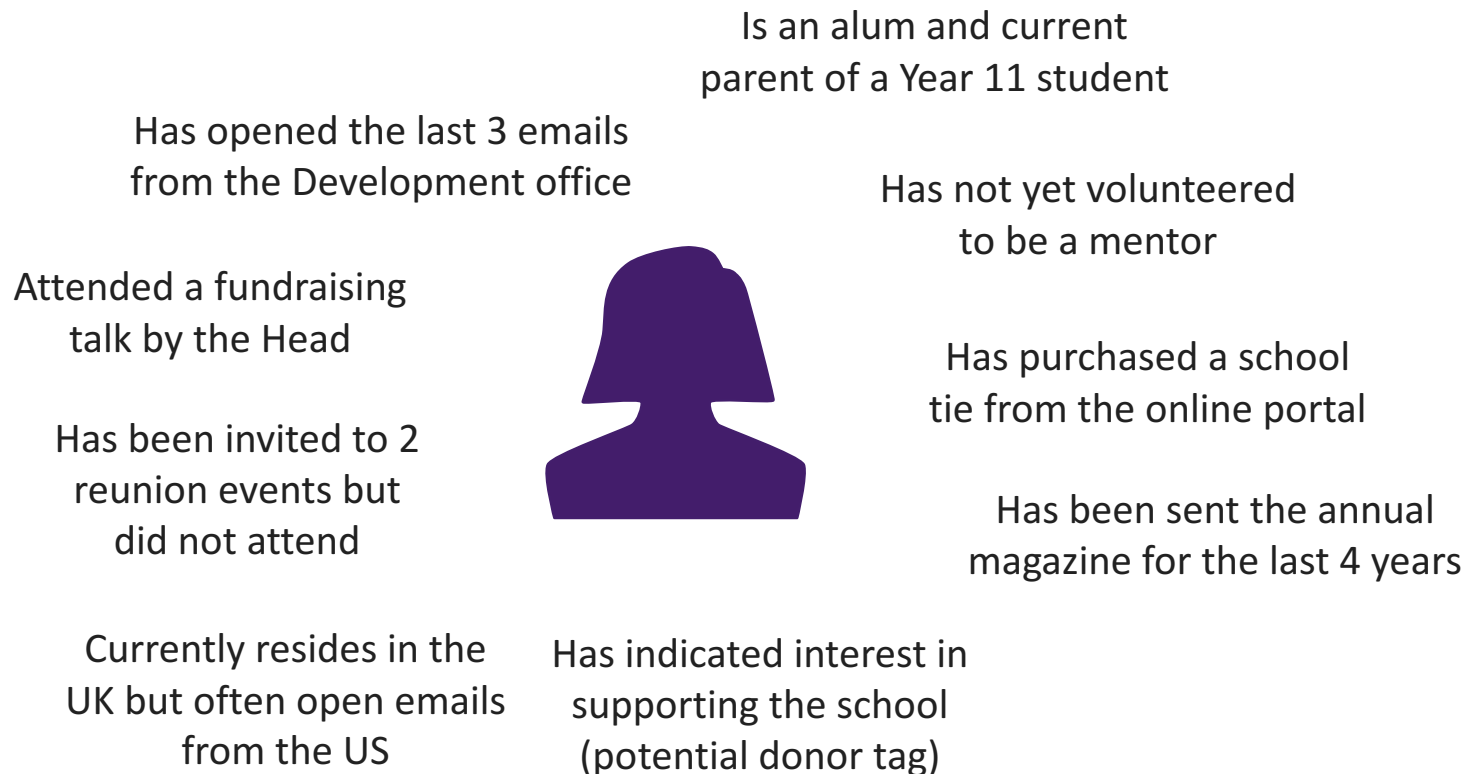
e.g. your goal is to start a major donor campaign for a capital project

- ✓ Wealth indicators
- ✓ Interests aligned with specific fundraising project
- ✓ Propensity to give
- ✓ Previous support



# A single record view

Having everything in one place for a person in your database makes it easier to comply with GDPR, run filters, avoid duplicates and work across a team





# Tips when collecting data:

**Unique IDs/ reference codes** – each record should have unique ID, especially if you have data spread across parts of database or even across different systems

**Individual records** – data clearly stored for a person, not a couple or family - you can link a consent/ payment/ GiftAid declaration to a specific person

**Consents** - do you have the right consent (IF you are using consent as your legal basis for processing data)? Avoid consents limiting your future strategy

**Consistency** – use same terminology, naming conventions and field labels

**Filter-able** – right info in right field/ table! Avoid free-text unless categorised

**Audit trail** - changes are date stamped , who and when was data changed?

**Stored securely** – goes without saying! Limit access, back-up, store in EU etc



# Specific tips for schools:

We've seen countless examples of migrating data where these fields have been poorly captured and it stores up long-term issues



## **Student year group and year left data ('class of')**

This data isn't transferred very well from MIS systems – the 'class of' is key to group people for alumni events, and the link between parents and students in specific year groups is also important if parents are a fundraising audience for you



## **Industry professions**

Often poorly captured - without defined pick-lists and with a mix of profession/ sector/ job title/ free text stored in a table which then can't be filtered or easily analysed



# In summary:



Decide your fundraising/ marketing strategy first and then collect the data you need to execute this strategy (rather than the other way around!)



Streamline your data by using categories and tags – think “how am I going to run a search or create a filter group using this information in the future?”



Categorise as much as possible – not just wealth indicators and affinity scores – but interests & careers data – use quantized and consistent lists/ fields



Consider what automated data you can collect – e.g. email opens and website interactions - and whether a pipeline would help you track your projects



Review what data you have, store it securely and tell your data subjects what you’re doing with their information



Enter data carefully to your database and aim for a single record view



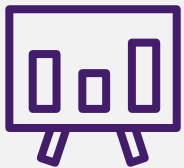
# Thank you!

Any questions?

Please contact Kate – [kate@toucantech.com](mailto:kate@toucantech.com) - if you'd like:

- ★ A copy of our Guide to Data Entry
- ★ A demo of how ToucanTech helps schools to capture, organise, store and segment data

**Also, a special offer for any IDPE members on today's webinar!**



For anyone considering a new database, we're offering a FREE data review of your existing data sets (including categories and pick-lists) if you book a demo of the ToucanTech software before 15<sup>th</sup> February 2019