



Guide to Intentional Data-Driven Fundraising



How to get the most for your grateful patient program.



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Overview

A strong fundraising strategy begins with carefully organized donor and program data. That data becomes the foundation from which the strategy can be built or made successful. It informs an accurate and effective results-driven system that propels fundraising efforts forward. Without a clear system in place, nonprofits risk inefficiencies and overlooking important opportunities.

Data-driven fundraising involves using collected and analyzed data to inform and improve fundraising efforts. It utilizes patient, donor, and engagement data to pinpoint potential donors, understand their giving patterns, and customize communications to boost donor engagement and increase contributions.



From Data Point to Donor

Philanthropy is most effective when organizations form deep connections with donors.

Cultivating a prospect from a collection of data points is about building a genuine relationship from raw information. It's about recognizing the individual's personal connection to your cause, engaging them with meaningful and personalized communication, and fostering trust. When they feel recognized and understand how their contribution makes a difference, they're more likely to give. This process isn't just about numbers—it's about creating a heartfelt connection that motivates the prospect to become a dedicated supporter of your mission.



What It Means To Be Data-Intentional

Organizations often face challenges such as:

- Collecting too much data without clear objectives
- Struggling to analyze and interpret results
- Incorrect or unreliable results

The challenges relate to several factors:

- **Data fragmentation** - Data is often spread across different systems or sources, such as donor databases, email platforms, and social media. Without the right integration, it's hard to get a complete, accurate view of donor behavior and engagement.
- **Limited resources** - Many organizations operate with small teams and tight budgets, making it difficult to invest in data management tools, technology, or staff training.
- **Lack of expertise or technical skills** - Staff may lack the technical skills needed to analyze and interpret data effectively, leading to missed insights and opportunities to optimize fundraising strategies.
- **Inconsistent data collection** – Organizations may not consistently collect the right data, or they may collect data without a clear strategy, leading to gaps or poor-quality information.



Building Infrastructure

- Requires resources and investment, specific knowledge
- Utilizing an intentional workflow with assessed data and systems
 - CRM
 - Transfer mechanisms
 - EHR
 - Data Warehouse
 - Other 3rd party (i.e. wealth screening, event, peer-to-peer)
- Clean data and clear reporting needs
- Automation wherever possible

Achieving sustainable growth in the nonprofit sector requires a focused effort on building capacity and expanding impact through strategic initiatives. The first step is to invest in your team by enhancing their data literacy skills. When staff can effectively interpret and use data, your organization can make informed decisions, boost operational efficiency, and create compelling stories that connect with donors.



Intentional Data

With the right infrastructure in place, focus your efforts on prospect and donor behavior—not just transactions. The goal is to translate activity into a clear picture of what's working, what's stalling, and where to invest your time next.



Intentional Data (cont'd)

From there, define a small set of key performance indicators (KPIs) that are tightly aligned with your goals and reviewed on a consistent cadence (monthly is often enough; weekly during campaigns). Some of these may include:

- Donor retention rate
- Donor lifetime value
- Average gift size
- Recurring gift percentage
- Fundraising ROI
- Online gift percentage
- Email open rate
- Email click rate

To make these KPIs useful (not just “nice to have”), assign an owner, a target, and an action for each one. For example: if retention dips, what is the specific outreach or stewardship change you’ll make? If online gifts rise, what channel or message should you double down on?

Finally, pair your KPI dashboard with a short set of “learning questions” to guide decisions, like:

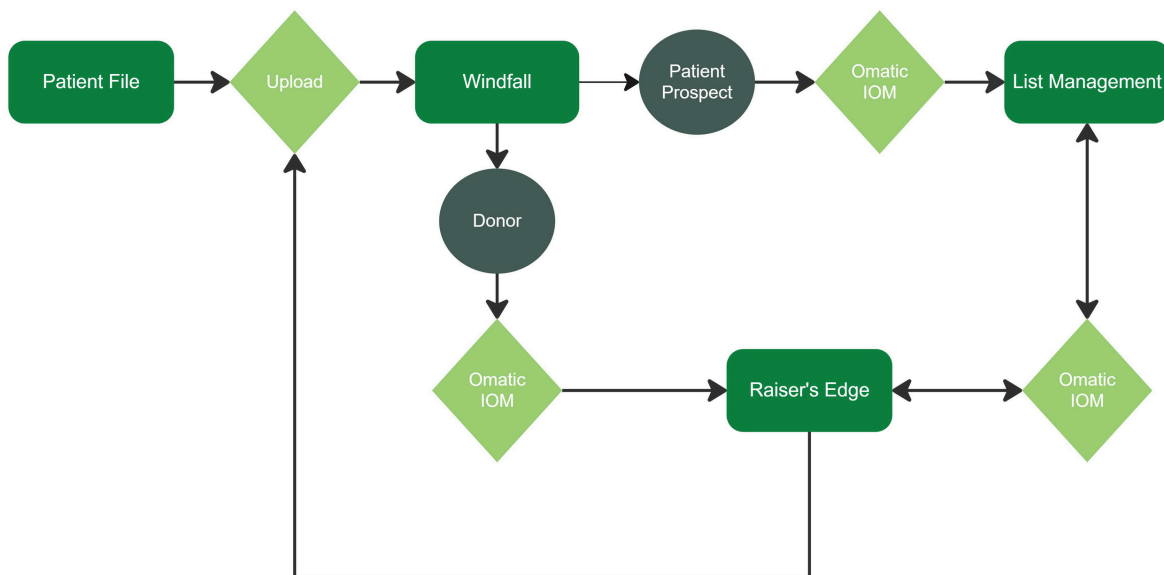
- Which segments are most likely to upgrade or lapse?
- What touchpoints reliably precede a second gift?
- Which campaigns bring in donors who stay?
- Where are prospects getting stuck in the pipeline?

That’s when measurement stops being reporting—and starts driving fundraising strategy.



How to Build Your Grateful Patient Analytics

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Segmentation

Segmentation is where grateful patient work becomes actionable. By grouping patients and families based on shared characteristics—capacity, affinity, and engagement signals—you can prioritize outreach and personalize the experience without guessing.

A strong starting point is identifying a segment of patient prospects who show both:

- High wealth capacity (ability to give) and
- High inclination/affinity (likelihood to give based on behaviors and connection)

From there, refine your segments using data points such as:

- Visit patterns (frequency, recency, specialty lines, service area)
- Physician or care team connection (repeat providers, referral patterns)
- Engagement history (event attendance, newsletter interaction, website actions)
- Philanthropic indicators (prior giving, grateful patient program responses, family giving)

The objective isn't to label people—it's to build a practical, ethical outreach plan that meets patients where they are and reflects what they care about.

Expand outreach for a broader range of data points. As your program matures, incorporate additional signals (surveys, story/thanks submissions, volunteer interest, reunion/gratitude moments, departmental engagement) to deepen segments beyond “wealth + frequency.”



Pipeline Development

Segmentation identifies who to focus on; pipeline development defines what happens next—step by step—so grateful patient prospects don't stall out. Build a simple, consistent pipeline with clear stage definitions. A common structure might include:

- **Identified** – patient prospect meets baseline criteria (capacity/affinity/engagement)
- **Qualified** – reviewed by gift officer or team; known connection and realistic pathway
- **Engaged** – 1:1 outreach begun; meaningful touchpoints recorded
- **Cultivation** – relationship deepening; interests clarified; next step scheduled
- **Solicitation** – a direct ask is made (or proposal shared)
- **Stewardship** – gift received; impact reporting and relationship plan documented

To keep the pipeline healthy, define minimum activity standards and service-level expectations, such as:

- Time to first outreach after qualification
- Required number of touches per quarter by stage
- When a prospect should move stages (and when they should be paused)

Then tie your analytics to pipeline performance—not just revenue:

- Conversion rate by stage (Qualified → Engaged → Solicited → Gift)
- Time in stage (where prospects get stuck)
- Top “feeder” sources (service lines, events, referrals, gratitude moments)
- Most effective touchpoints (what actions actually lead to meetings and gifts)

Finally, ensure your pipeline is clinically respectful and privacy-aware: use only appropriate data, avoid over-personalization, and align outreach practices with compliance and patient experience standards.



Summary

Data maturity fosters consistent donor growth, strengthens trust, and enhances community impact. When infrastructure is solid and your team is data-literate, you can move beyond reporting and into decision-making: prioritizing the right prospects, personalizing outreach, and strengthening retention through stewardship that actually reflects donor behavior.

Organizations that embrace data-driven strategies position themselves for long-term success—because they're not just collecting information. They're building a system that turns insight into action, and action into sustainable philanthropy.

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