

Guide

An inside view on data and fundraising

An interview with **Ben Park**
from **Minor Tickets** by
Wendy Smithers



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Why should we be interested in using data in fundraising and how should we be using it?

Most arts and cultural charities are in a much stronger position than other charities as they are collecting data anyway as ticketed organisations. This data is a massive asset and great for fundraising. Box office data alone is a good starting point for fundraising campaigns so make sure you use it. How you use it depends on how ambitious you want to be. You can start by segmenting data into three groups:

- those who give regularly (even if it is just donating £2 every time they buy a ticket) - you should start here as these people want to support you;
- those who give occasionally (could you ask for more from this group?);
- those who have never given and might not ever give.

This will paint a picture of who supports you; what is the average donation and where there is potential to give more. What sort of shows or events your regular supporters attend, where they sit - the cheaper seats or the top tier - and the groups that they make up when they attend. Think about the logical next step for them; if they give regularly could they be encouraged to join your membership scheme?

Do we need to take stock of where we are before we start?

Yes - particularly in relation to Box Office staff, they need to be equipped and able to make the 'ask'. Many Box Office staff have limited sales experience and feel uncomfortable about asking for donations. This can be improved by something as simple as training and a couple of clear processes and prompts in place.

You need to ask for donations online in a simple and appropriate way. Tell them why you need money and create awareness that you need it, even if they don't give, that awareness raising is valuable. Resist the temptation to use lots of copy. Keep it short and simple.

As well as the Box Office data, getting contact lists from development, education and press teams will help you understand the organisation. Get all the lists in one place and you'll be better able to understand the total relationship individuals have with your organisation. Someone might not give much money but may give hours of their time as a volunteer in the education team and it won't look good if you're asking them for a donation without knowing this.

What is the purpose of our database and what are the essential things we need to get right when managing and using it?

Firstly, it doesn't need to be a nightmare. Basically a fundraising database is just a fancy address book. It gives you names and contact details and the why and how of their past history with your organisation. A more sophisticated version will record pledges and donations and when they were made, the background on the donors and their relationship with the organisation. It allows everyone in your organisation to access information about them and gets vital knowledge about donors out of people's heads and ensures it is shared appropriately.

How do we go about linking data on donors to data on ticket buyers if this is a new area for us? What CRM systems and/or software should we be using?

There is technology available to help us link ticket purchases with donations information. Aligning box office systems with fundraising processes enables us to have a 360° view of each individual to better understand how, why and when people give, or might give.

Ideally you shouldn't use Excel as, in my experience, it quickly becomes tricky to manage large lists of people with notes, donation details etc. It is difficult to manage data of this kind on spreadsheets as there is no way of telling who has changed what and when. There are some good, free CRM (Customer Relationship Management) systems available. One example of which is [High-Rise](#). It is free at the lowest level or around \$20 a month for larger organisations. The larger CRM enterprise software systems include [Salesforce](#) and [Microsoft Dynamics](#) but it is well worth making sure that you look outside the sector as the best system for your needs may not need to be arts/culture specific. The sort of system that is right for you will depend on the amount of data you have and what you want to do with it. If you're taking lots of small donations and asking for a Gift Aid declaration, a system that automatically generates claims for you will be worth the investment.

What skills, capacity and experience do we need to develop our use of data?

Ability to use and manage databases should be included in fundraising job descriptions. An understanding of CRM isn't vital, but being able to interpret and make decisions based on the data you collect will improve fundraising campaigns. Whether you're planning a cultivation event or a piece of fundraising print, use the data to help you craft the message to prospective supporters. For example, if you know you have lots of families who attend regularly, use that to inform the messaging on your print. Think of using data to inform fundraising as a gradual process. Don't be paralysed by it and don't try and do it all in one go.

How can we use data to inform our planning and develop customer and/or donor insights?

We can use quantitative data as outlined above, but we can also talk to our front line staff to get some insight on what customers say about the organisation and factor that into our fundraising planning. When people donate on the phone, what makes them decide to do it? What do our customers say when we tell them about our fundraising campaigns?

Starting thinking and behaving like a retailer. Supermarkets would not put out a product or give it shelf space without first testing it and knowing that their customers wanted to buy it. It will likely only be a small tier of your customers who have influence and capacity to give in a significant way, whether it be support in terms of money or advocacy. Using the information held across the organisation will help you to find them. Let your box office team know who they are and trust them to make sure they are treated well when they visit.

Any advice for co-ordinating departmental efforts on use of data, eg marketing and fundraising and managing conflicts that may arise?

Don't exist in a vacuum; you have to work together with different parts of your organisation in order to get the best results. Everyone is working to the same end, whether it is getting a donation or selling a ticket, you are all trying to get people to buy-in to your organisation and support your work.

Using entirely separate marketing and fundraising departments can lead to wastage and duplication of efforts in smaller organisations and your fundraising and general communications strategies must be aligned. If you are a larger organisation and it is still relevant to separate teams, be clear why that separation is in place and ensure communication is regular and appropriate.

Take a combined approach and speak to your customers with one voice. Your customers do not perceive you as the 'marketing department' and the 'development department' and your output should be consistent.

Any nuggets of wisdom to finish? What advice would you give to organisations on how they can make better use of their data and databases?

Ask for donations when people are buying tickets; whether on the phone, online or in person. Make it second nature for everyone to ask and invest in helping your staff to gain confidence.

If investing in fundraising technology, don't expect it to magically work for you. You'll have to invest time in it but don't think you need to do everything overnight!

About CultureHive

This guide was produced as part of CultureHive, a free knowledge hub where you can discover and share best practice in cultural marketing and fundraising. Visit culturehive.co.uk for more great resources.