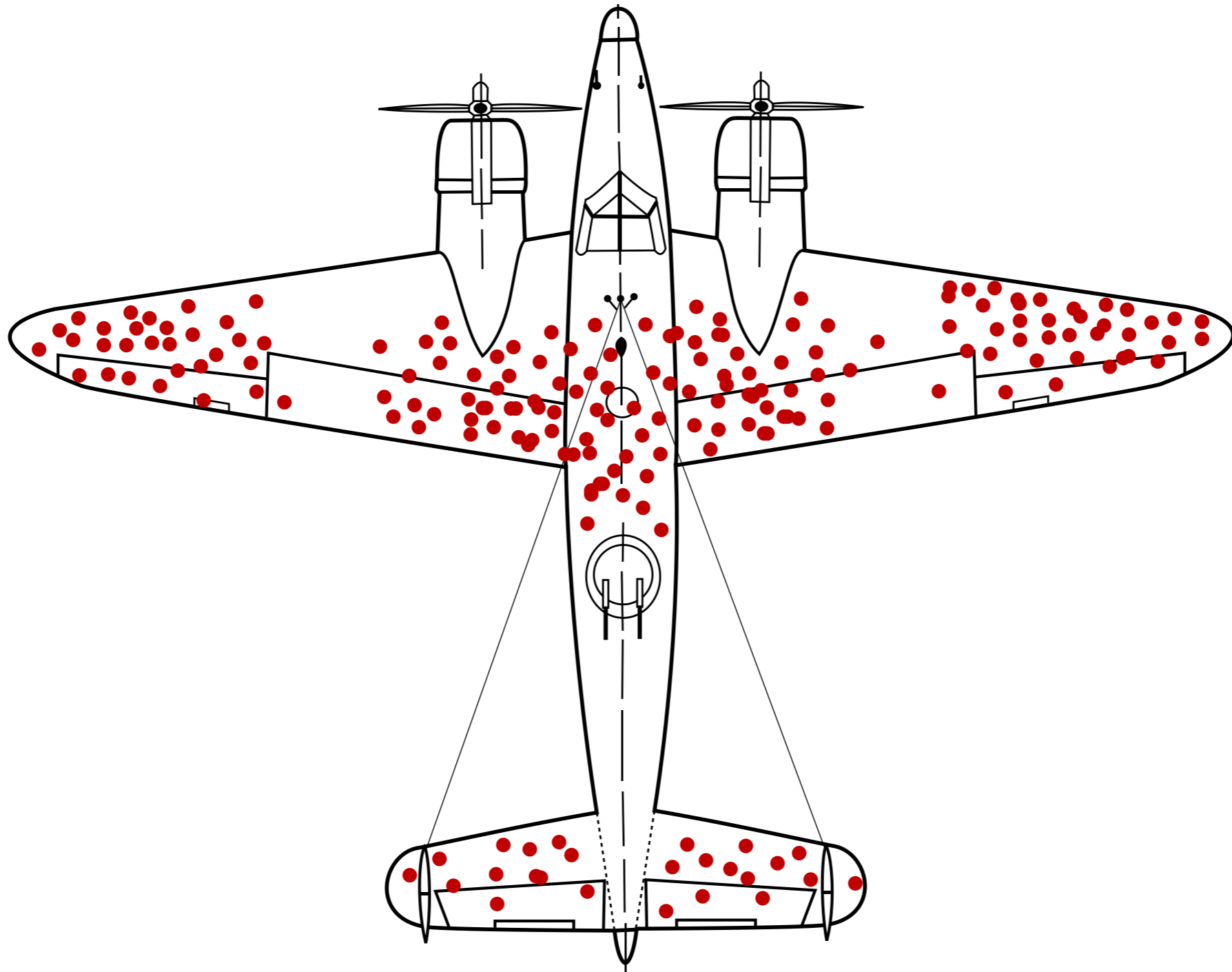


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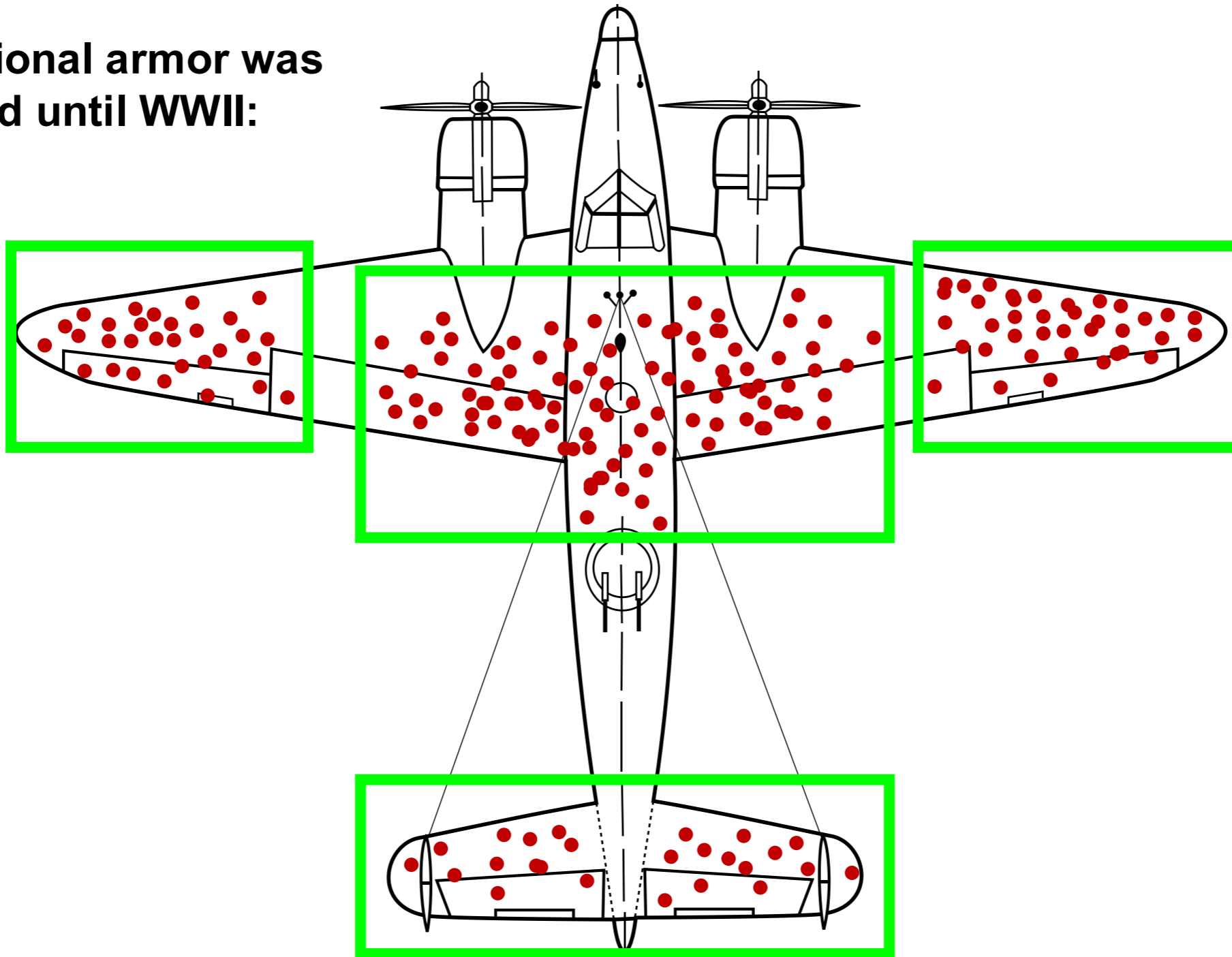
From Dashboards to Decisions: Using Fundraising Data that Actually Matters



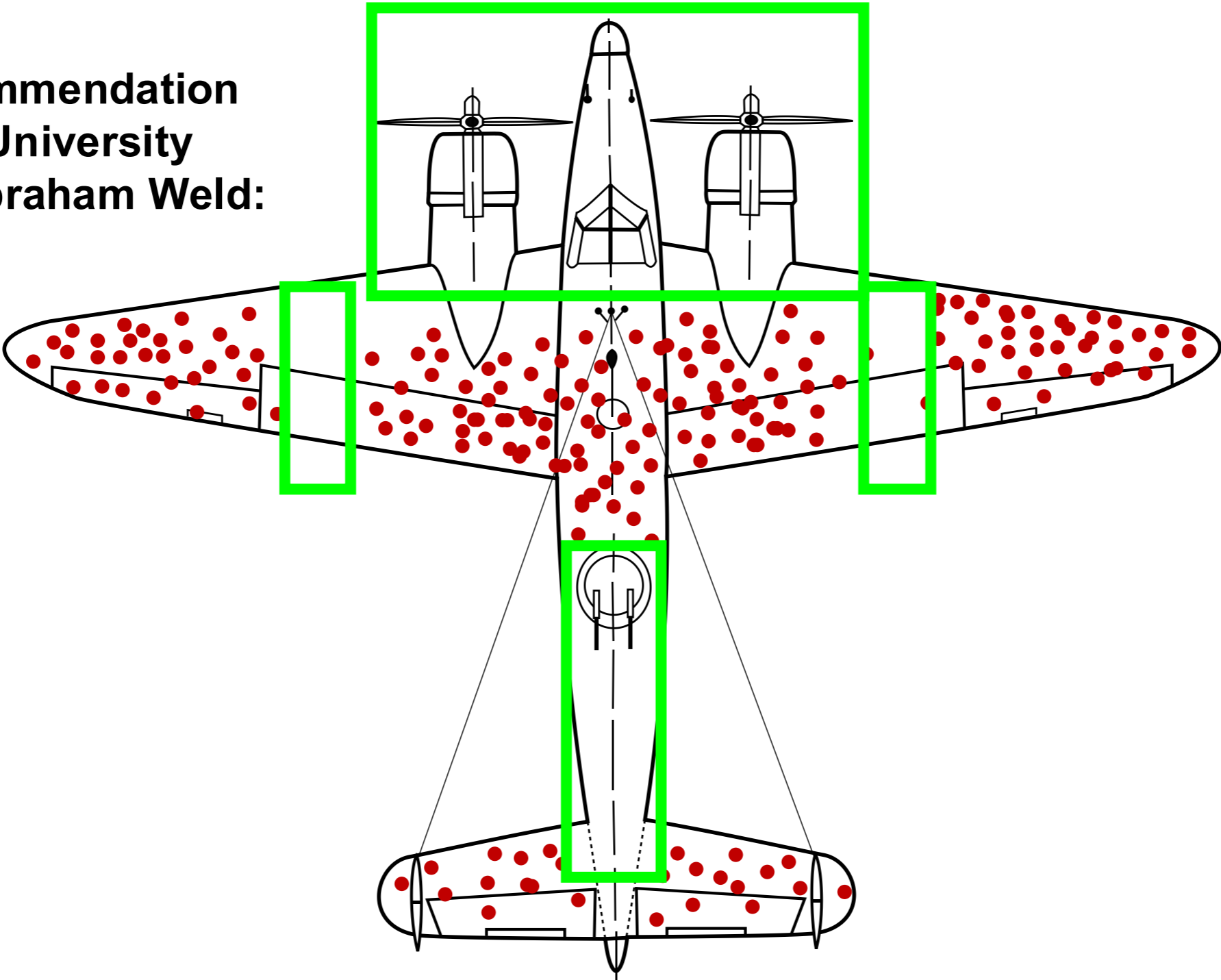
PART 1: Good Data, Incomplete Conclusions



Where additional armor was being applied until WWII:



**Revised recommendation
by Columbia University
statistician Abraham Wald:**



Fundraising reporting overrepresents the donors who “made it back”.

- The bullet holes were real! But the initial read was still incomplete.
- Fundraising reports often do the same thing. They show the donors who responded, the campaigns that produced revenue, and the segments still active enough to measure cleanly.
- These all matter (just like the bullet holes). They are also the easiest parts of the file to see.
- The parts that can transform your program are usually one layer down: who *stopped* responding, who shifted behavior, who is carrying more of the revenue, and who no longer shows up where we expect them.

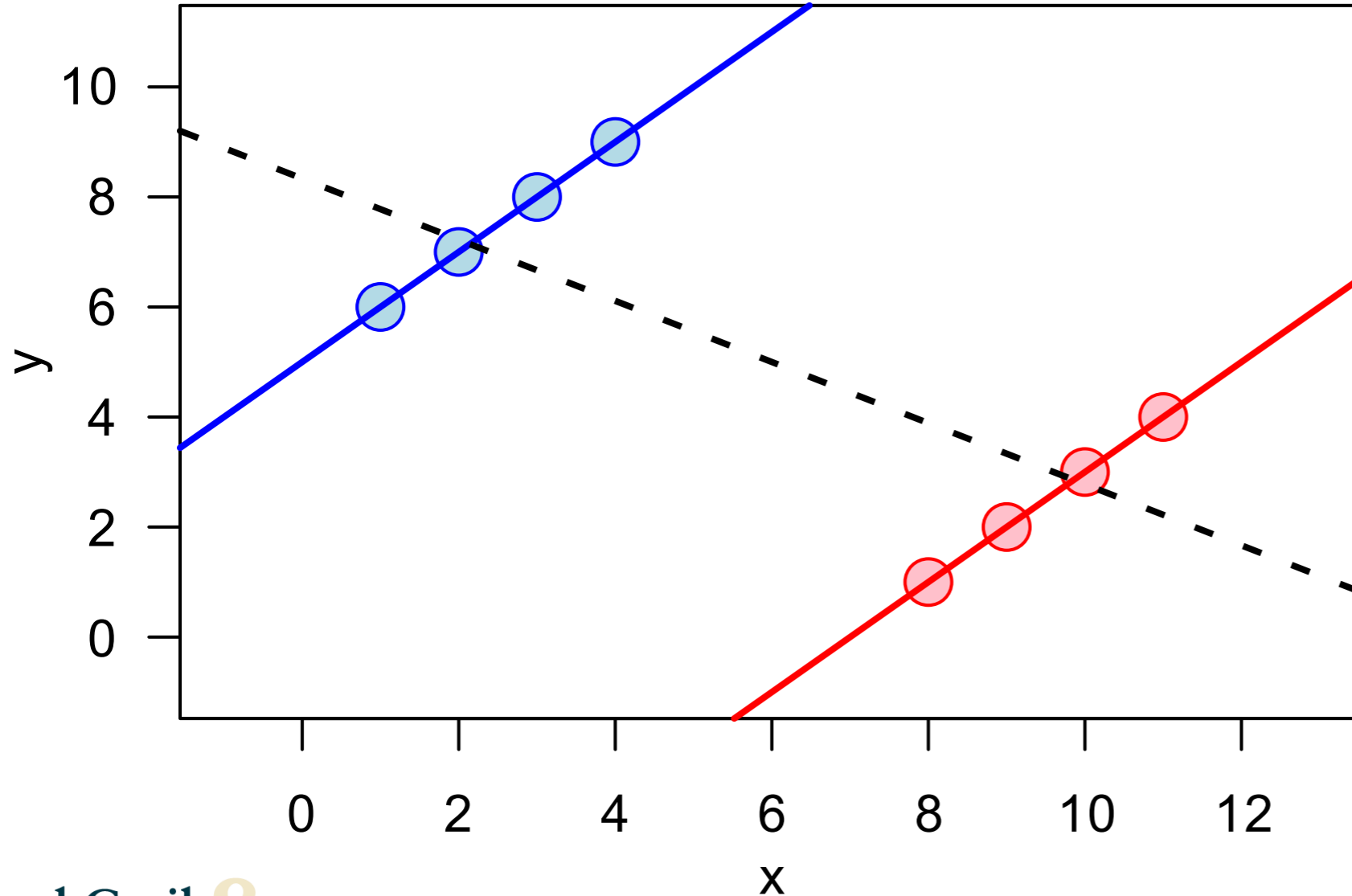
A clean report can still point in the wrong direction.

- Most reports are built around what our systems can summarize confidently:
 - Revenue by campaign | Response by segment | Gifts by channel | Retention by year.
- That creates a natural pull toward the cleanest and most recent parts of the file.
- Meanwhile, the program-shaping questions are often in less accessible places: donors who didn't return, gifts that shifted to other avenues, segments that receded without crashing revenue, sources that looked good before second-year behavior caught up.

“Overall” can be directionally true and still hide what matters.

- Overall results smooth together donors who are in very different places in the file:
 - A retained multi-year donor, a first-time donor, a second-year donor, a lower-dollar donor, and a DAF donor are not creating the same kind of value or risk.
 - Revenue can hold while fewer donors carry more of the program.
 - Retention can look stable while new donors are failing to come back.
 - Average gift can rise because lower-dollar donors receded.
- The most useful insights don't usually come from file-wide averages.

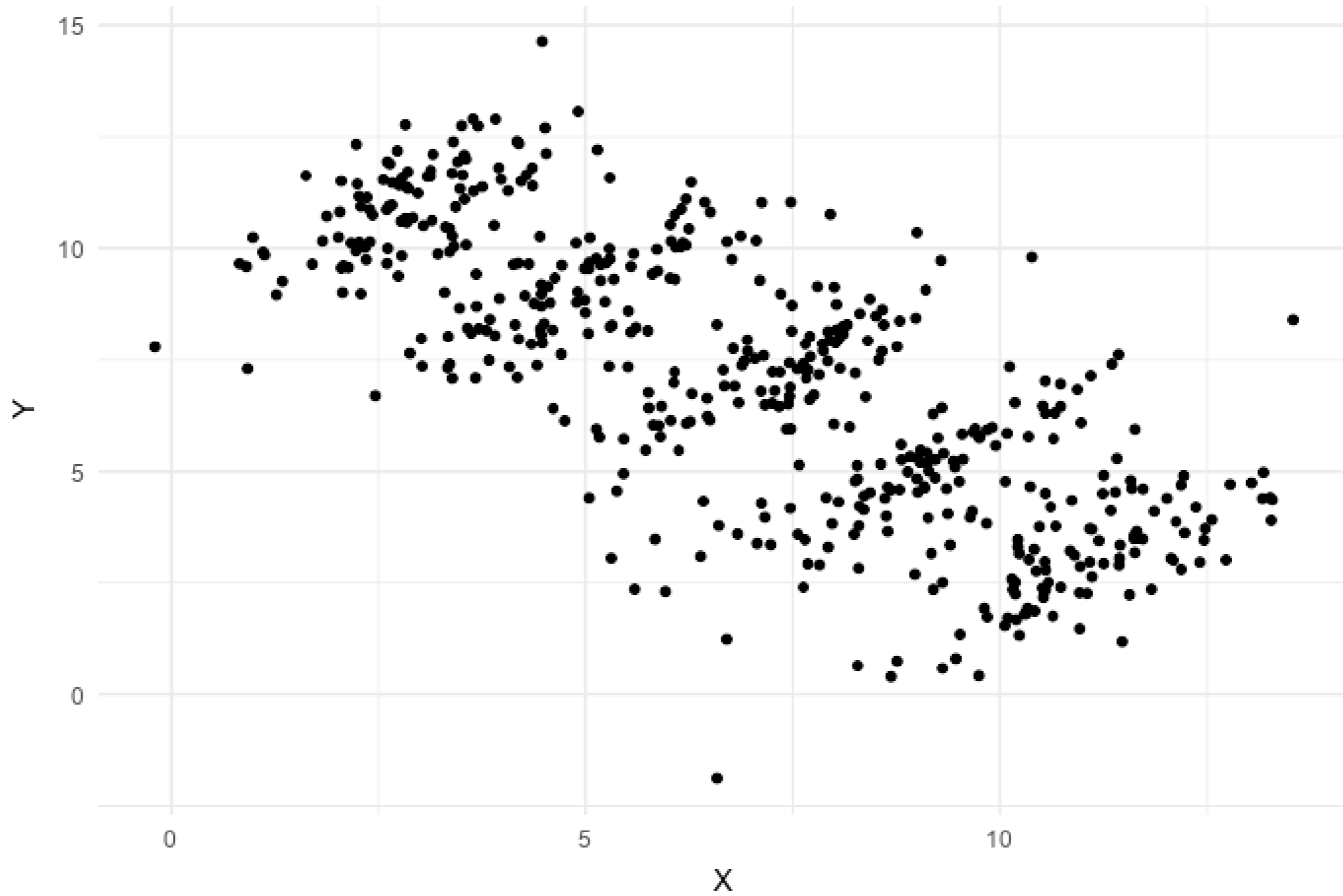
Simpson's Paradox



“Simpson's paradox is a phenomenon in probability and statistics in which a trend appears in several groups of data but **disappears or reverses when the groups are combined.**”

Source: Wikipedia

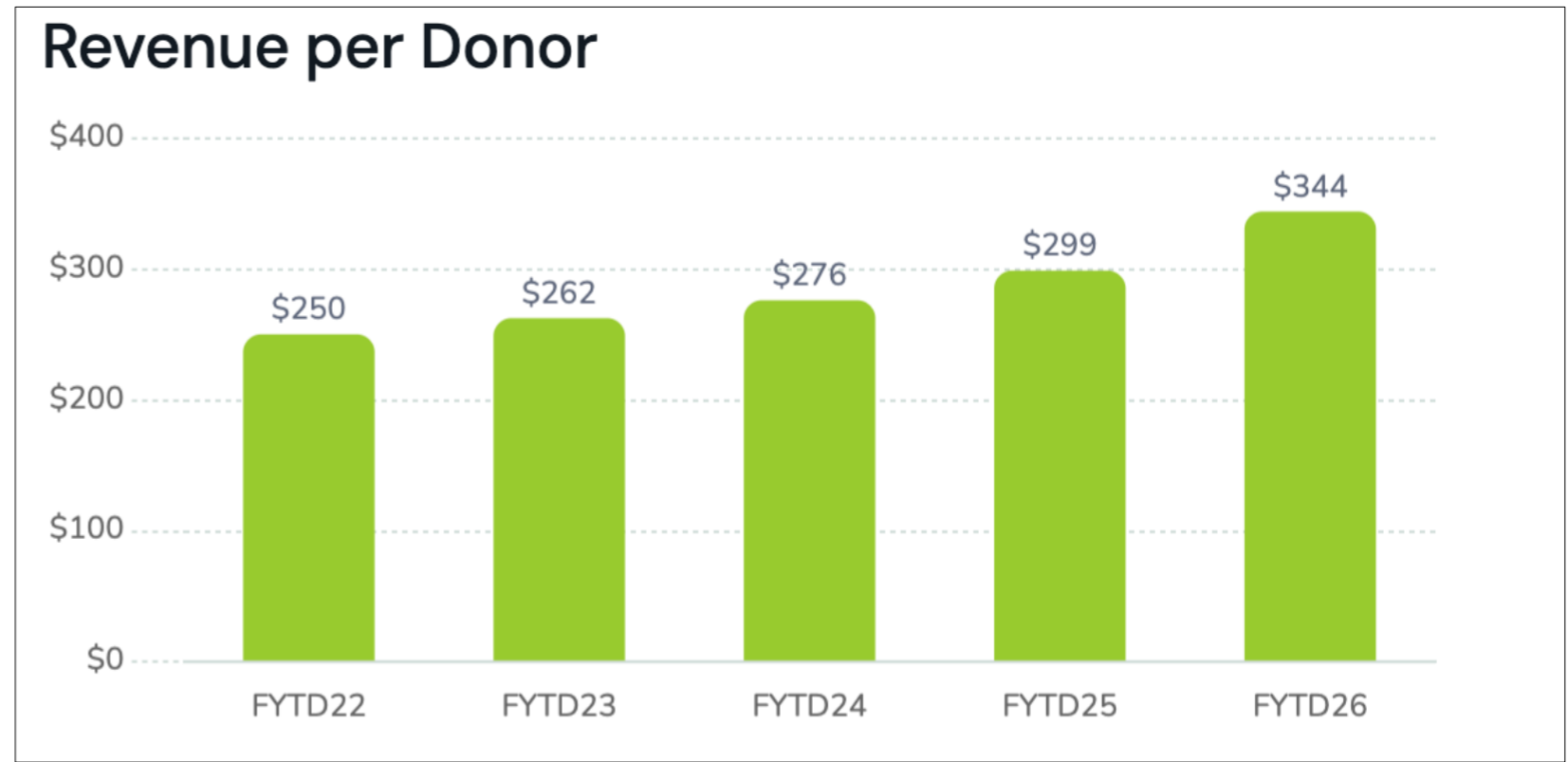
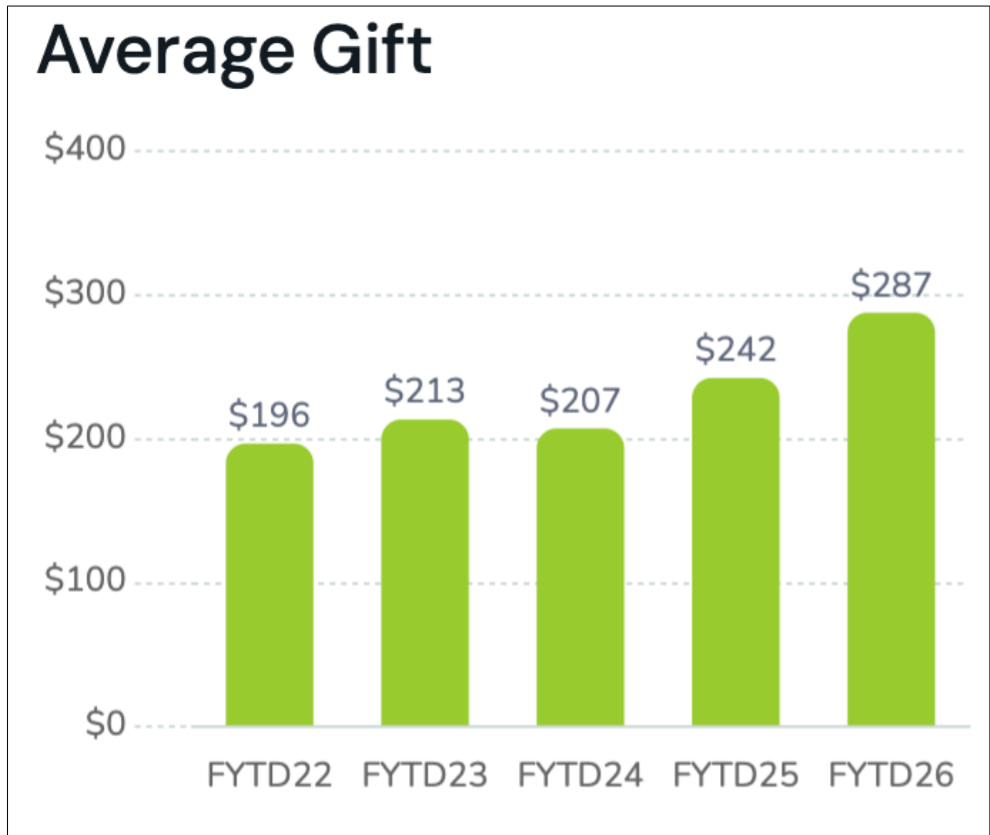
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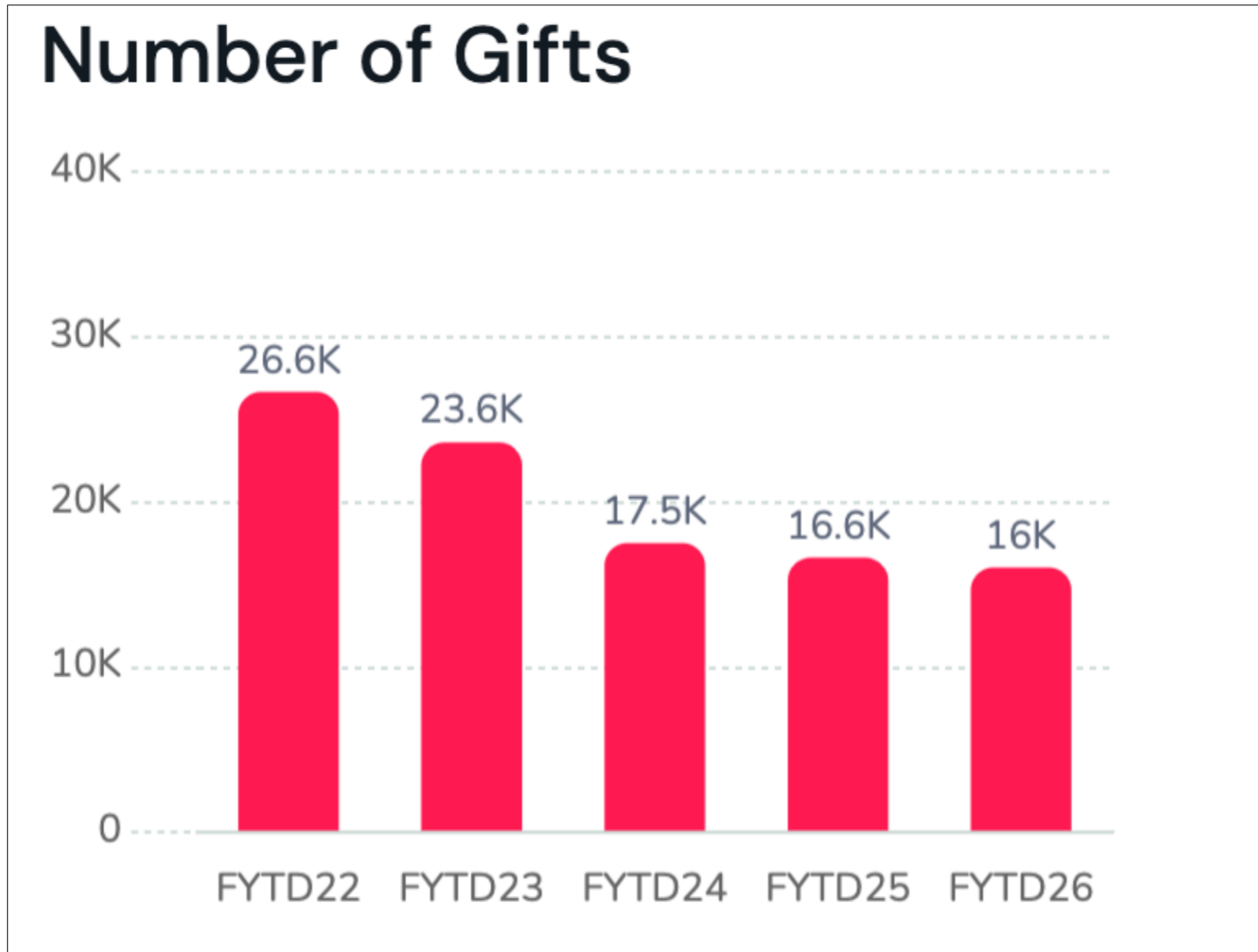
Fundraising averages blend together donors who need individual decisions.

- A file-wide retention rate can include new donors, second-year donors, multi-year donors, mid-level donors, and donors giving through DAFs.
- Those groups are not moving through the same relationship stage. They don't carry the same risk and they don't always need the same treatment.
- If retention softens, the answer may be acquisition quality, second-gift conversion, renewal timing, lower-dollar participation, mid-level movement, or attribution.

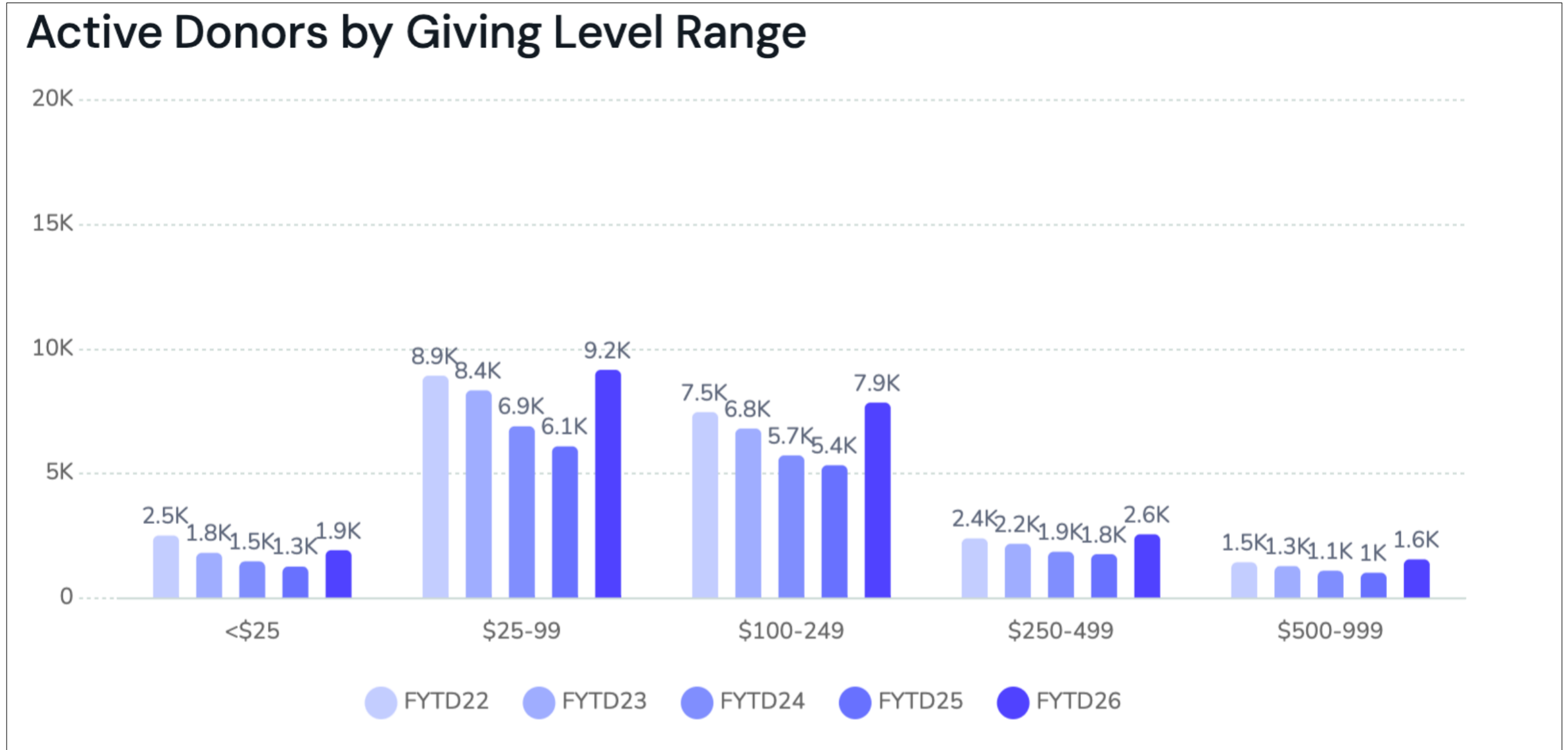
Example: Average Gift & RPD Increased!



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Example: DAF Channel Migration

30 days after in-home, a Summer Match midlevel package was behind projections and prior year results. However:

- Digital wasn't absorbing the response.
- Whitemail wasn't filling the gap.
- Delivery wasn't an issue.

Example: DAF Channel Migration

30 days after in-home, a Summer Match midlevel package was behind projections and prior year results. However:

- Digital wasn't absorbing the response.
- Whitemail wasn't filling the gap.
- Delivery wasn't an issue.

The donor response had moved into a reporting blind spot: DAF gifts coded as soft credits.

Once those gifts were matched back to the mail file, the campaign had more than made up the gap.

Negative Trends Can Be Healthy Signs

- The goal is not always to push every metric up.
- In this case, a lower average gift is a sign that lower-dollar donors were coming back. If average gift drops while donor count grows, especially in the lower-dollar bands, that may be a healthier file.
- The same movement that looks negative on a dashboard may be exactly what the strategy was designed to create.

PART 2: Start Digging. You'll Hit It Eventually.

Trends Need a Second Question

- Retention declined. Which donors?
- Revenue grew. From whom?
- Average gift increased. Why?
- Mid-level donors disappeared. Where did they go?
- Acquisition improved. Did they stay?

Most fundraising decisions fail because we stop after the first question (metric).

The metric tells us where to look, the next question leads us to action (diagnosis).

The first sign of a trend is rarely in the dashboard.

- Most meaningful changes begin in a small portion of the file.
- New donors can weaken while overall retention still looks stable.
- Participation can erode while revenue continues to grow.
- Channel shifts can emerge long before donor counts change.
- By the time a file-wide metric moves, the underlying behavior may already be well established.

Donors don't stop when the reports are run.

- A report freezes the file at a moment in time.
- Donors are upgrading, lapsing, consolidating gifts, shifting channels, and changing how they give constantly.
- Donor movement often matters more than the category they currently occupy.
- The biggest opportunities are helping donors cross from one segment to another.
- Significant value is gained or lost in these transitions.

The story should survive multiple cuts of the file.

- Most fundraising questions require more than one view of the data.
- A retention trend may look different by tenure, giving level, acq source, or giving vehicle.
- Revenue trends often change when participation is separated from donor value.
- Donor loss may look different after channel shifts, upgrades, or DAF activity are considered.
- Some explanations become stronger with every cut; others begin to fall apart.
- Diagnostic fundraising is the process of eliminating explanations until the story holds together.

Start with a trend, not a hypothesis.

- Retention is down.
- Revenue is up.
- Average gift increased.
- Mid-level donors declined.

Pull more reports than you think you need.

- Overall metrics rarely explain themselves.
- Look at the same trend by giving level, tenure, acquisition source, channel, campaign, and giving vehicle.
- Most reports will tell the same story. A few will tell a different story, which is where the investigation begins.

Look for the place where the story changes.

- Revenue is growing, but participation is declining.
- Overall retention is stable, but first-year retention is falling.
- Average gift is increasing, but fewer donors are giving.
- Mid-level donors are declining, but DAF giving is rising.
- The most useful insights often appear when two reports disagree.

Follow the contradiction until it makes sense.

- Every report is telling part of the story. The goal is to find the explanation that fits all of them.
- Some trends become stronger as more reports are added. Others disappear entirely.
- Keep going until the story holds together.

Better decisions start with better explanations.

- The goal is better decisions, not more reporting.
- A trend without context often leads to the wrong response.
- The most valuable insights usually come before the dashboard changes.
- Diagnostic fundraising is the discipline of understanding what changed before deciding what to do next.

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Thank you!

