FOCUS FURTHER SOLUTIONS

Stop Reporting, Start Responding: Smarter Use of Donor Data

DPP Lunch Series

October 2025

Presentation Outline

- About Sigrid Penner and Focus Further Solutions
- Why we do what we do
- Meet '***Meals Matter***' - our pretend fundraising team
- A demo of the ***Meals Matter*** Donor Insights dashboard
- Questions / Conversation!

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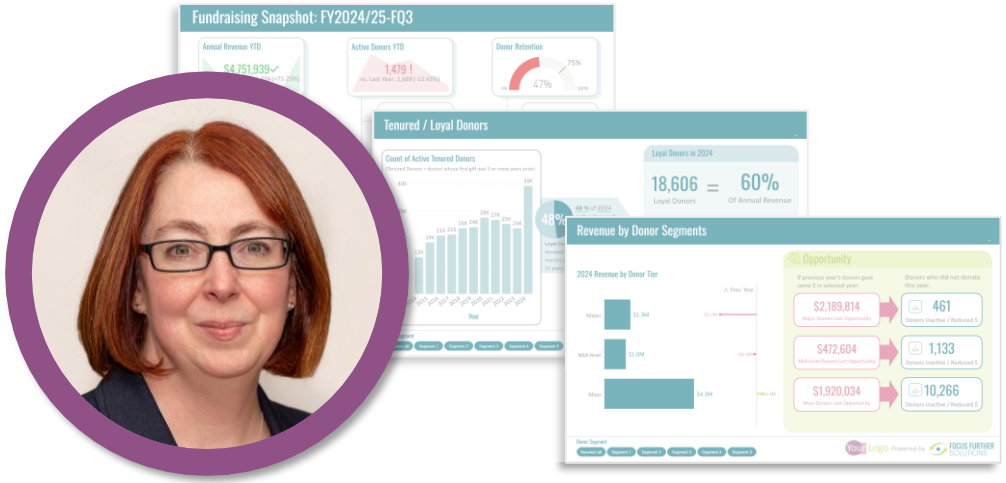
About Focus Further Solutions

Meet Sigrid Penner, Focus Further Solution's Principal Consultant

- Data geek before it was cool
- Partnered with brands like Airbnb, Nike, Five Guys, The New York Times
    - Common thread? **Everyone struggles with messy data and turning it into meaningful action**
- Shifted focus to nonprofits in 2020
- Five years deep into fundraising data — and still learning every day
- Grateful to support organizations driving real impact



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Data-informed Fundraising: How We Support Organizations

Individual Services

- Donor Insights Program
- Total Donor Data Deep-Dive
- Donor Surveys
- Campaign Support

Combined Service

Fractional Donor Insights Partner

We bridge the gap between data – insights – action without more tech tools.

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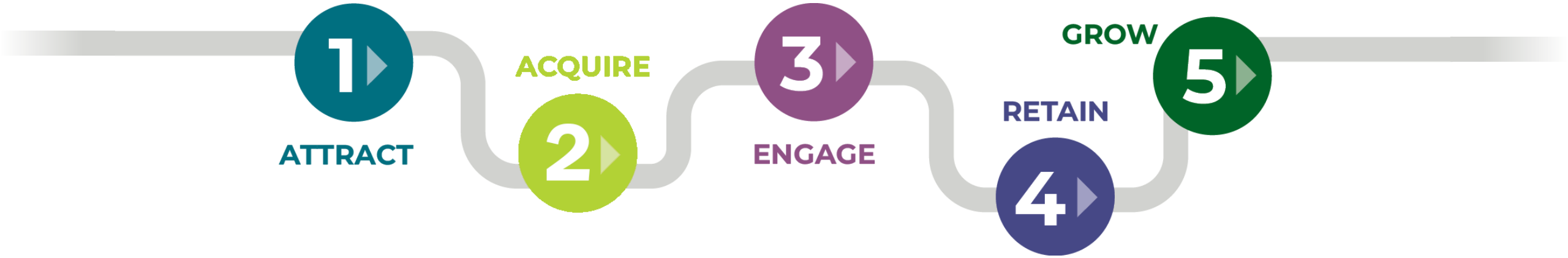
Here's what we know - trends



Attracting and acquiring new donors to the organization is getting harder.

Donor engagement is a balancing act — tech + human touch + mission alignment.

Identifying the right donors for mid-level, major, planned giving activities is often more art than science.

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Let's Take a Poll …

What is your biggest challenge when it comes identifying donor prospects (within your known donors)?

- ❑ Identifying which donors have real growth potential
- ❑ How to best engage with prospects
- ❑ Data quality / incomplete donor information
- ❑ Limited staff time to analyze donor data
- ❑ Turning donor data into clear actions for fundraisers
- ❑ Measuring whether using prospects lists is actually working

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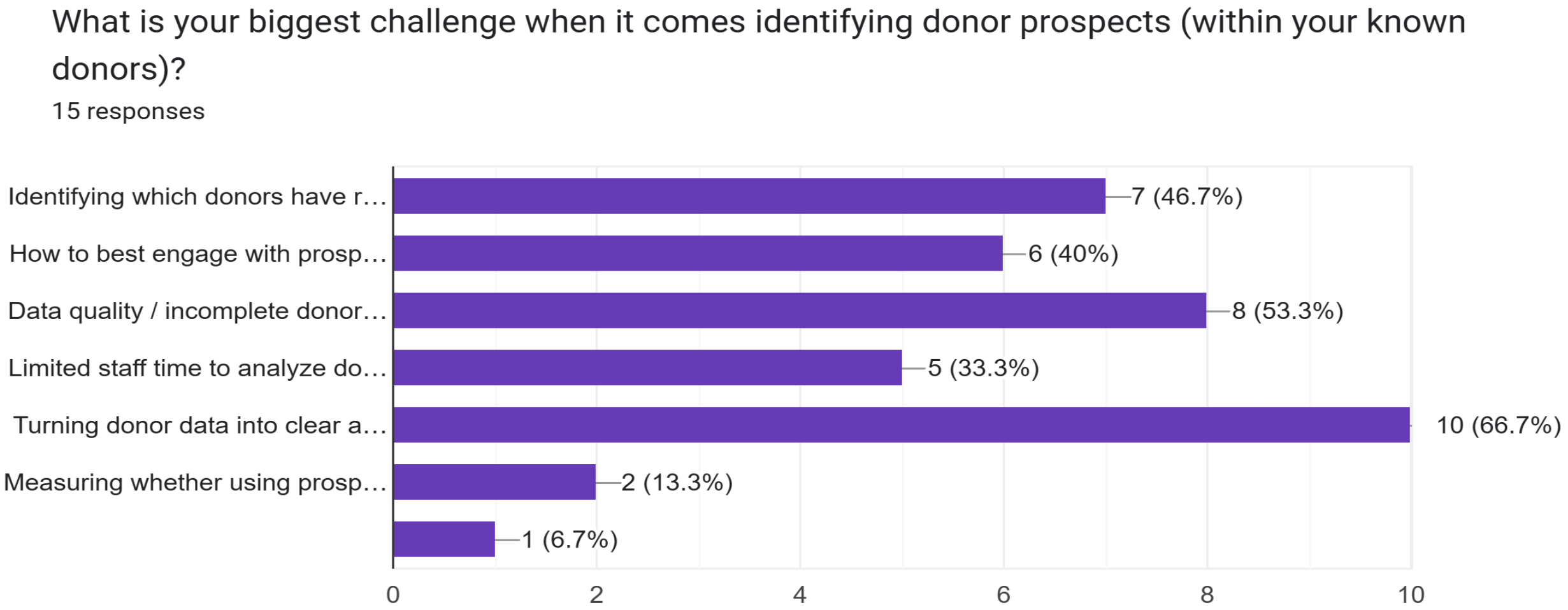
Poll Results: What is your biggest challenge when it comes identifying donor prospects (within your known donors)?



Donor Insights Program (demo to follow)



Donor Insights Program

- Fundraising Snapshot Dashboard
- Up to 3 Custom Dashboard Views
- Custom Donor Opportunity Lists
- Co-Branded Dashboards
- Personalized Service
- Quarterly Insights & Support

Who is this 'right' for?

- If getting real insights out of CRM is challenging for your team
- Reports don't tell you what you need to know
- Don't have a data analyst on staff
- Your active donor file is large enough that your team doesn't have a solid connection to each of them

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Meals Matter – our Demo Organization



- **Meet *Meals Matter*:** a community-based charity delivering healthy meal kits to families for over 40 years.
- **Longstanding success, shifting dynamics:** while total revenue was growing, donor counts were shrinking … a familiar ‘donors down, dollars up’ story.
- **Challenge recognized:** their fundraising had become increasingly dependent on a few large donors, leaving new donors under-engaged and unretained.
- **Goal of the Donor Insights Program:** insights to understand new donor behavior, reinvigorate mid-level segment giving and focus on a monthly giving program.

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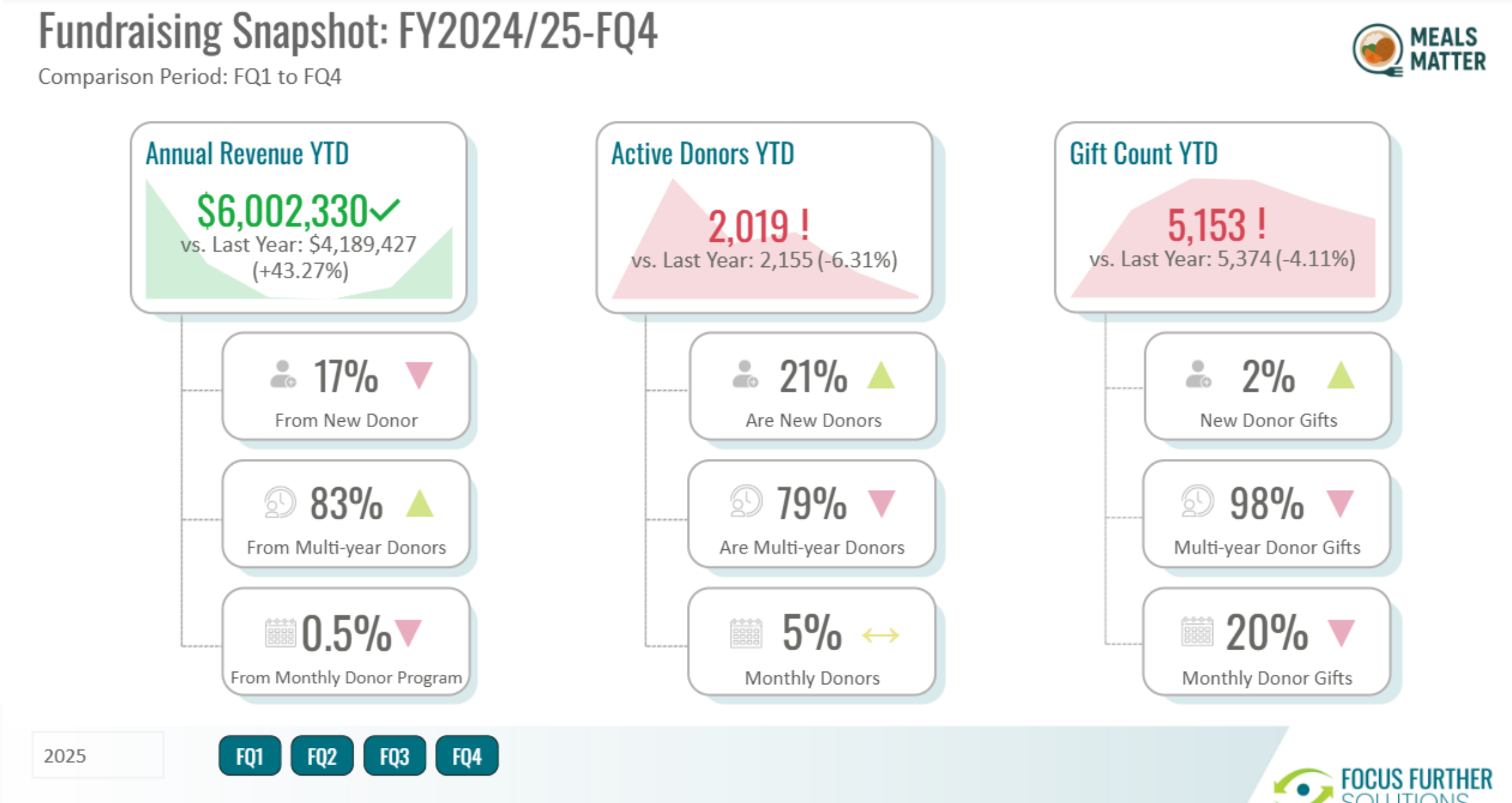
Demo: Screenshot



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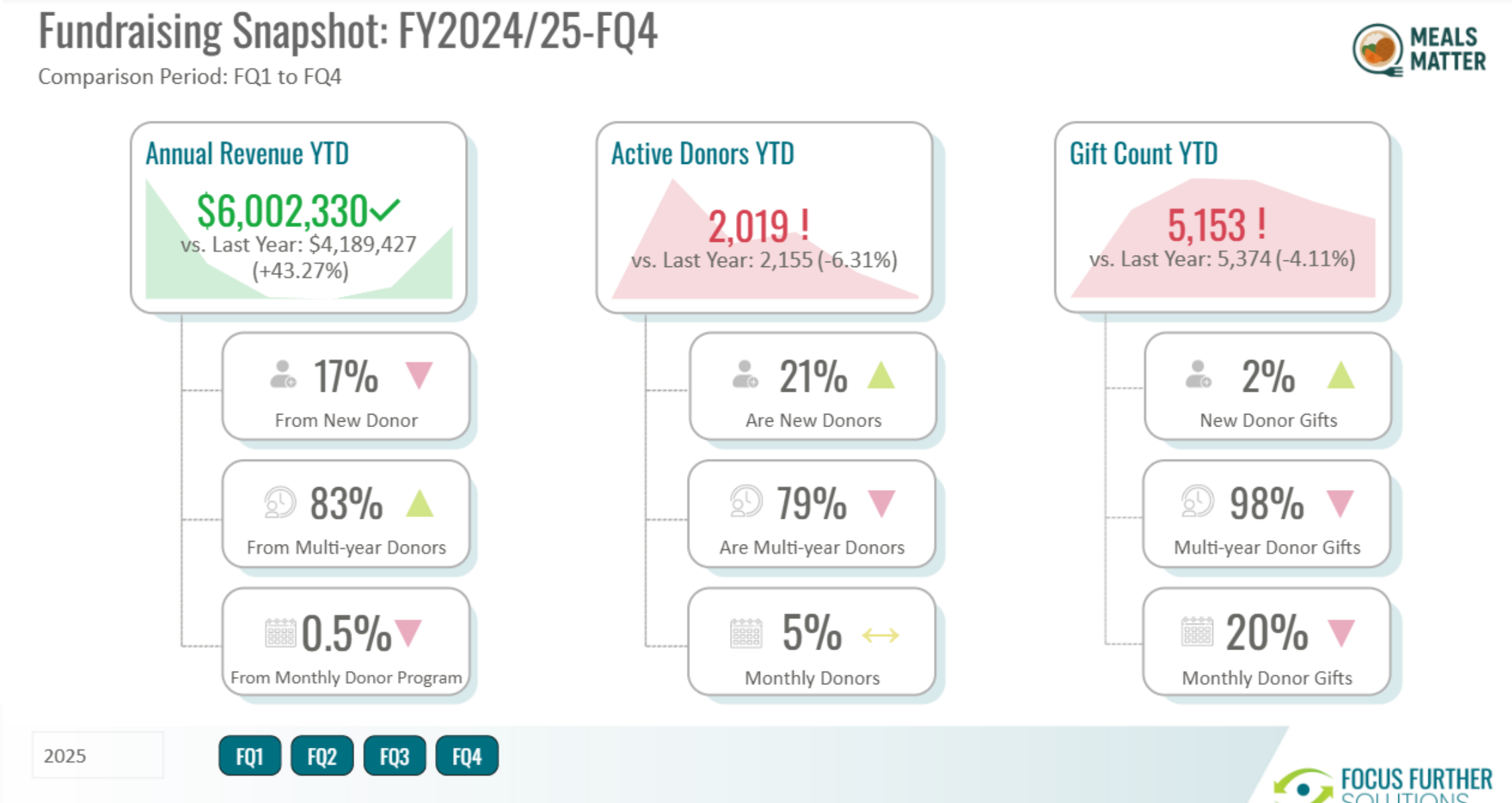

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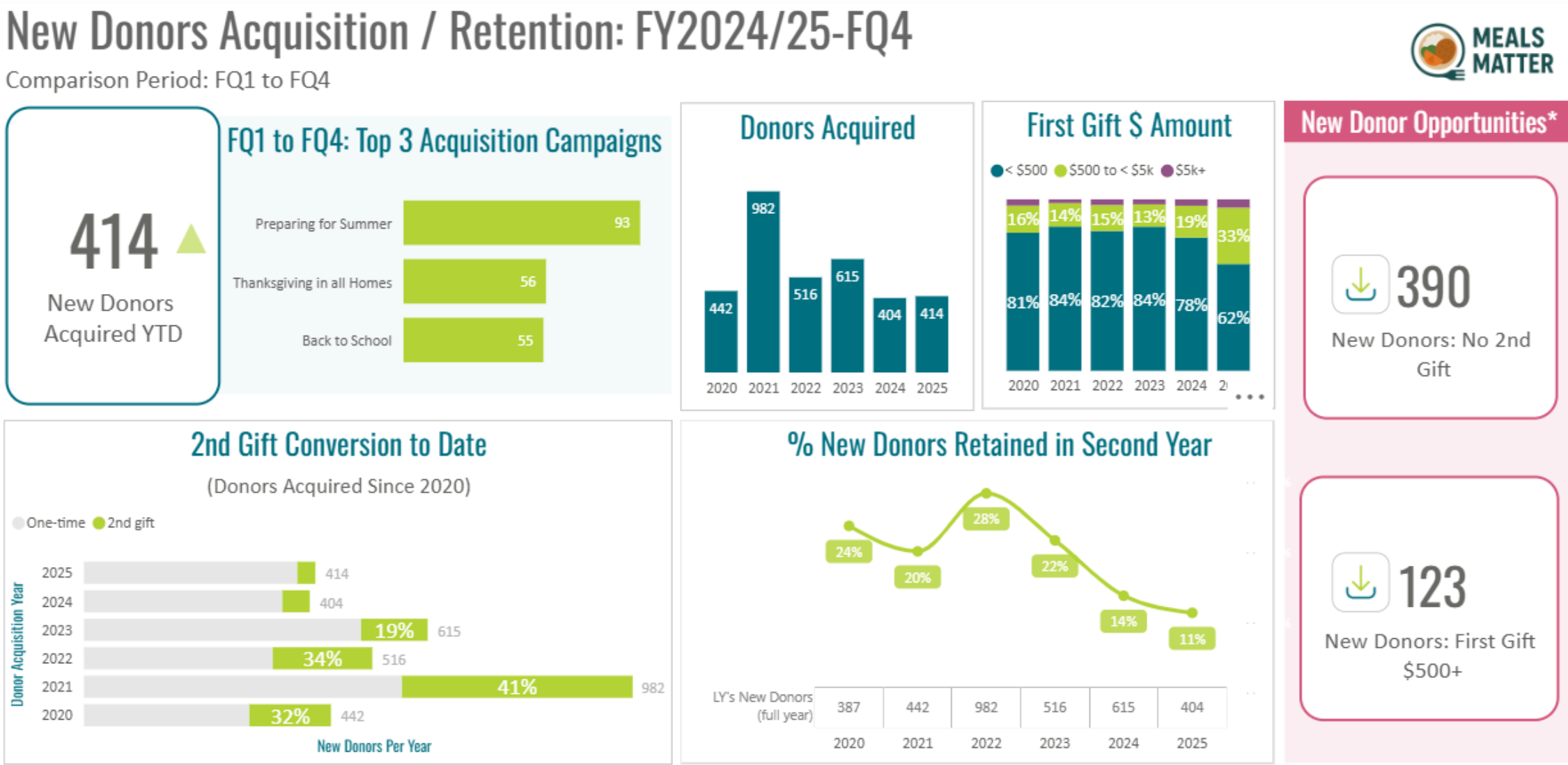

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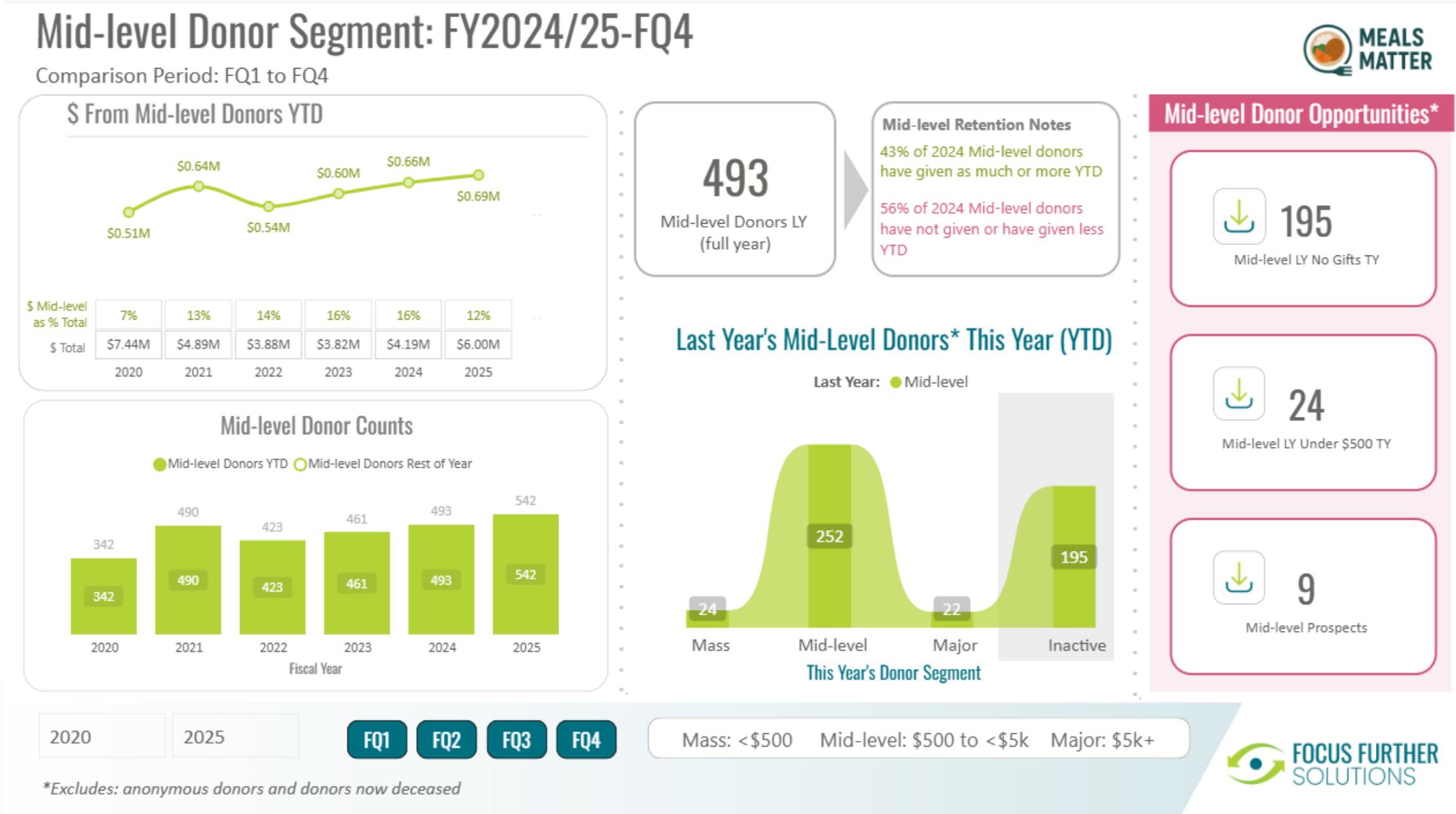

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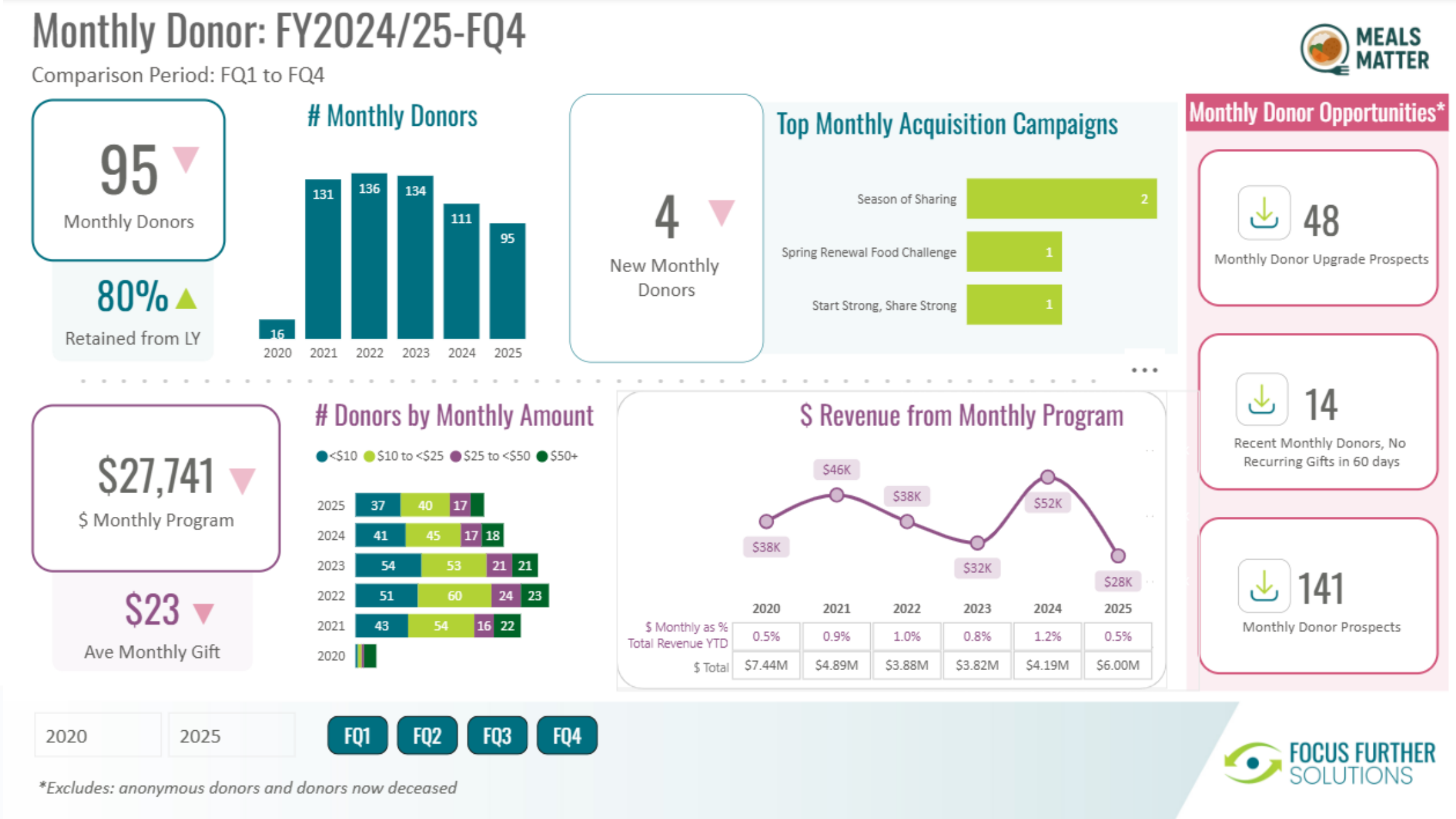
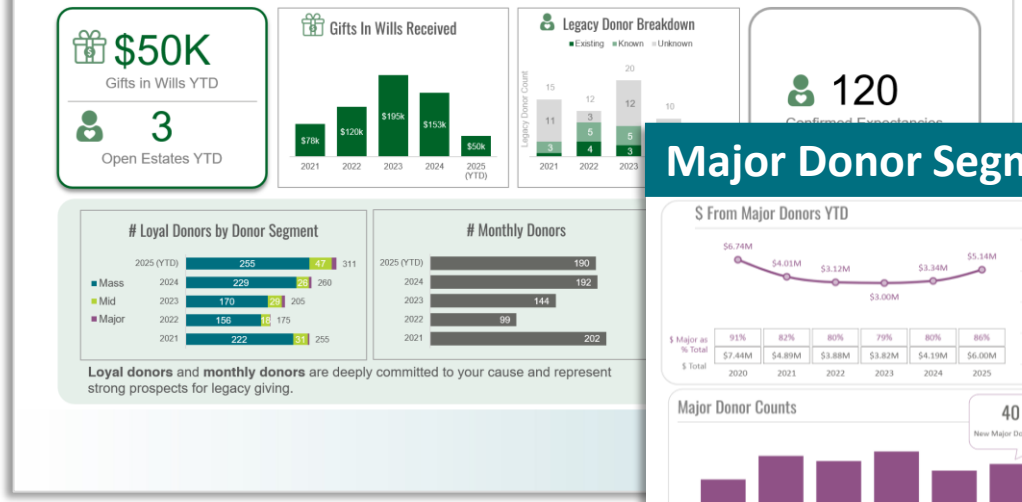
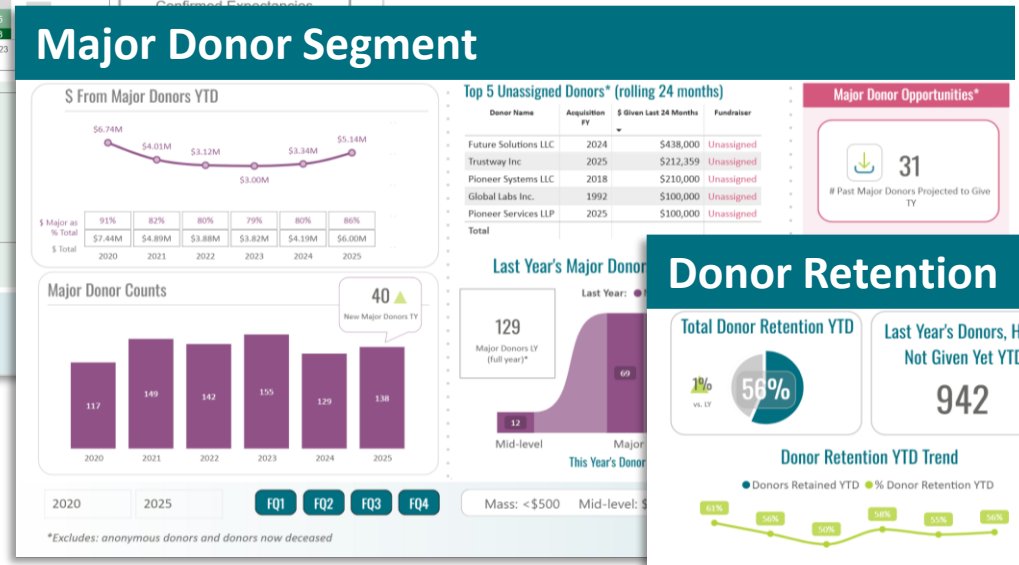


Donor Insights Program: Additional Insight Focus Areas

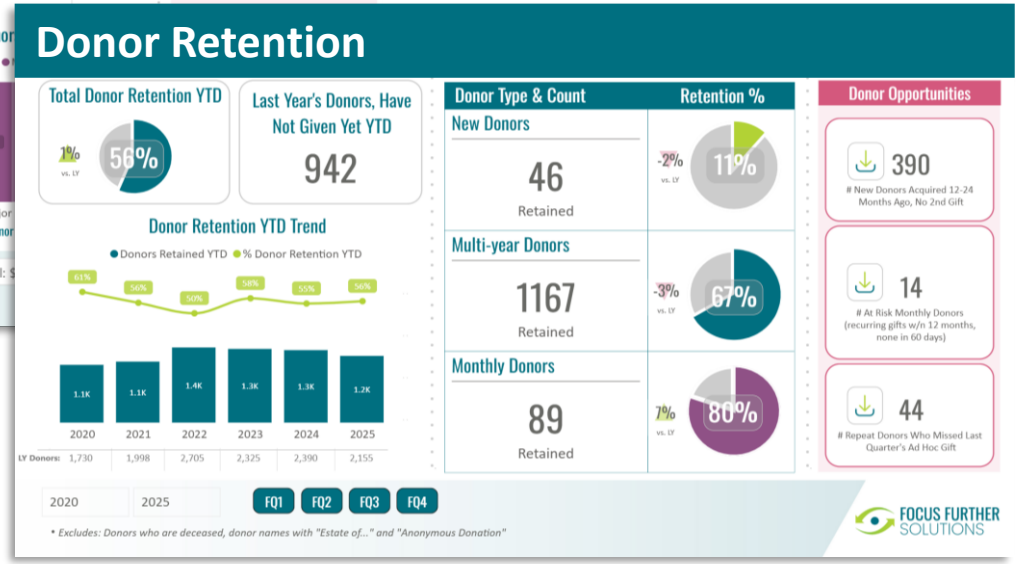
Planned Giving



Major Donor Segment



Donor Retention



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The Best Part:

Questions and Conversation

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THANK YOU

Sigrid Penner

Focus Further Solutions

204.792.0132

spenner@focusfurthersolutions.com

www.focusfurthersolutions.com

https://www.linkedin.com/in/sigrid-penner/

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Donor Insights Program Details

Fundraising Snapshot Dashboard

A visual overview of key fundraising metrics that highlights trends and opportunities at a glance.

Up to 3 Custom Dashboard Views

Tailored to your strategy—whether acquisition, retention, mid-level, major, legacy, or monthly giving.

Custom Donor Opportunity Lists

Target the right donors with curated lists aligned to your goals and capacity.

Co-Branded Dashboards

Your organization's brand, seamlessly presented with Focus Further Solutions as your data partner.

Personalized Service

"White glove" onboarding ensures dashboards fit your data, goals, and fundraising workflow.

Quarterly Insights & Support

Ongoing programs include quarterly refreshes, insights meetings, and next-step planning.

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