

# Four Must-Have Nonprofit Dashboards

Dashboards that aggregate and present different kinds of donor data in ways that are easy to understand have been a hot topic for fundraisers and executives for years.

In addition to the “standard” set of fundraising dashboards—for example, overall performance dashboards, campaign performance dashboards and donor relationship management dashboards—innovative nonprofits are developing new dashboards that extend the power of data visualization throughout their organizations.

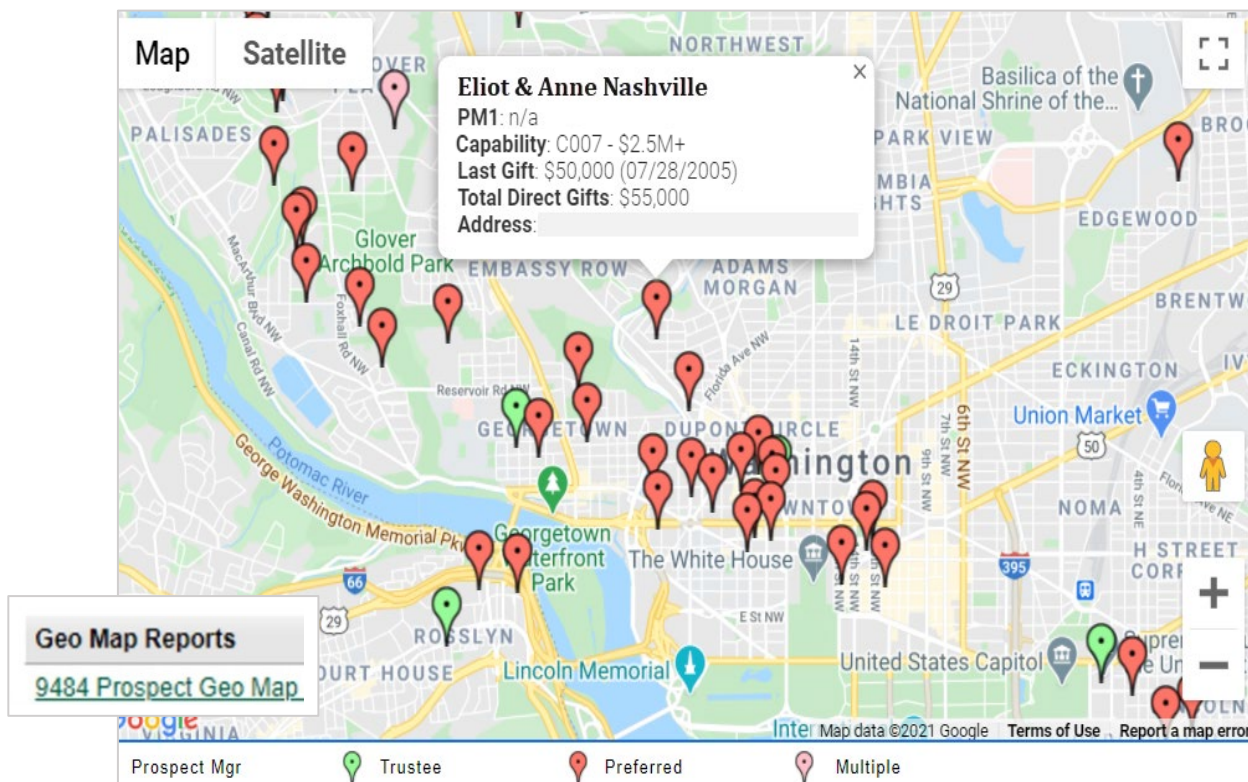


Here are four CRM dashboards that your nonprofit may find useful.

# 1. Donor Geography Dashboard

Being able to see your donors' physical location—and change the criteria on the fly—can reveal otherwise-hidden insights and suggest new prospecting and cultivation strategies. Ideally, you'll be able to map any segment or the results of any query—including current donors, LYBUNTs, SYBUNTs, gift amount, memberships, volunteer activities, events and more—to identify trends and possible opportunities for fundraising, volunteerism and programs.

*Donor geography dashboards add a new dimension to help identify trends and surface opportunities*



## 2. Engagement Score Dashboard

Engagement scoring isn't new. But to gain the most benefit, your team must be able to customize all engagement criteria, all scoring and the weight of each item for calculating the overall score. While a total engagement score is a good overall indicator, prospect managers should have the option to see the breakdown for each item in the score. Adding this highly granular personalized data to the complete donor record makes it possible to pinpoint opportunities for greater engagement for individual prospects as well as new segmentation of the database.

*Sample engagement scoring data*

VERY HIGH ENGAGEMENT		
<b>Jane Q. Doe</b>		<b>ID # 1322812</b>
<b>TOTAL ENGAGEMENT SCORE</b>		<b>83 out of 100</b>
BREAKDOWN	VALUE	SCORE
Lifetime Giving	\$23,792	10 out of 10
Consecutive Giving	6	5 out of 5
Months Since Last Gift	9	5 out of 5
Major Giver?	Y	5 out of 5
Gift Count	31	5 out of 5
Years Giving	12	5 out of 5
Years Increasing	4	3 out of 5
Recurring?	Y	5 out of 5
Stock	N	0 out of 5
Board Member?	Y	10 out of 10
Survey Responses	Y	7 out of 7
Has Email and Phone?	Y	3 out of 3
Number of Events Attended	14	10 out of 10
Participated in Annual Campaign (Team Lead)	Y	10 out of 10
Arts for All Champion?	Y	10 out of 10

# 3. Corporate Householding Dashboard

Family householding is a standard CRM feature that delivers insights about supporters and helps eliminate missteps like placing an individual in a SYBUNT campaign when their spouse or partner has been a consistent donor for years. Corporate householding dashboards extend the model to include all the different ways that employees of a corporation have interacted with your nonprofit. This data can be used to identify matching donations and support requests for grants, sponsorships, giving days, volunteer opportunities and more.

*ClearView's Corporate Links dashboard reveals constituent relationships throughout a business*

**159164 - School of Chemistry and Physics - Organization** 8 Attachments

Prospect Tags
Touches
Membership Activity
Mailings Sent
WealthEngine Info
Event Attendance
Corporate Link Dashboard
Corporate Links

Parent Corporation: Current Record
Unit ID: ---

**Contact Information**

159164 - School of Chemistry and Physics  
20665 4th St Ste 103  
Saratoga, CA 95070-5899  
(716) 691-2800  
support@softrek.com

**Primary Contact**

159122 - Marie Curie  
30 Bryant Woods N  
Buffalo, NY 14228-3601  
(716) 691-2800  
support@softrek.com

**Memo**

**Corporate Group Giving Summary - (Fiscal)**

	2017	2018	2019	2020	2021	Lifetime
# of Gifts	3	2	2	1	3	11
Avg. Gift	\$2,234.00	\$3,598.50	\$3,400.00	\$8,000.00	\$6,550.00	\$4,395.36
All Giving	\$6,702.00	\$7,197.00	\$6,800.00	\$8,000.00	\$19,650.00	\$48,349.00

**Corporate Group Giving by Fund - (Fiscal)**

Fund	2017	2018	2019	2020	2021	Lifetime
4012	\$0.00	\$650.00	\$1,800.00	\$0.00	\$10,000.00	\$12,450.00
4001	\$5,400.00	\$0.00	\$0.00	\$0.00	\$6,000.00	\$11,400.00
123	\$1,302.00	\$0.00	\$0.00	\$8,000.00	\$0.00	\$9,302.00
2002	\$0.00	\$6,547.00	\$0.00	\$0.00	\$0.00	\$6,547.00
4021	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00

**Affiliates**

0

School of Chemistry and Physics vs. Top Givers Fiscal 2021

**Actions**

	ID# 159164	Other Affiliates	Total
Open	0	0	0
Closed	5	0	0

**Connections**

	Inside ID# 159164	Outside ID# 159164	Total
Count	1	4	5

Unit ID	Connection ID - Name	Affiliate ID - Name
	159097 - Thor God of Thunder (Outside)	159122 - Marie Curie
	159112 - Dr. Neil DeGrasse Tyson (Outside)	159122 - Marie Curie
	159113 - Dr. Carl Sagan (Outside)	159122 - Marie Curie
	159122 - Marie Curie (Inside)	159164 - School of Chemistry and Physics

**Opportunities**

	ID# 159164	Other Affiliates	Total
Open	4	0	4
Closed	1	4	5

**Recent Gifts** Last 30 Days


	ID# 159164	Other Affiliates	Total
Count	3	0	3
Amount	\$19,650.00	\$0.00	\$19,650.00

Unit ID	Affiliate ID - Name	Date	Amount
	159164 - School of Chemistry and Physics (Inside)	03/29/2021	\$6,000.00
	159164 - School of Chemistry and Physics (Inside)	03/29/2021	\$3,650.00
	159164 - School of Chemistry and Physics (Inside)	03/29/2021	\$10,000.00

# 4. Event Bio Dashboard

A great CRM can have a wealth of detailed information about every prospect, volunteer and donor. But, when you're preparing for an event, staff want to see only the most important topline information about donations, engagement, personal history and interests. Compiling this information about attendees can be time-consuming research task! To address this issue, The Trust for Public Land created a custom Event Bio dashboard that displays total giving, capacity, relationship, estimated age, location, career and education information for attendees at events. The Event Bio even displays a photograph that makes it easy to identify donors by sight.

*Event Bio Dashboard*

<b>Jane Q. Doe</b>		ID: <a href="#">1322812</a>
	<b>Relationship Manager</b>	Evelyn Smith
	<b>Giving History</b>	\$200 – 1 Gift (2018-2021)
	<b>Capacity</b>	Unknown
	<b>Relationship</b>	Volunteer, Donor
	<b>Estimated Age</b>	44
	<b>Career</b>	Jane: Senior Financial Analyst, City Art Museum (Current Employee) Accounting Lead: Mountain Region History Museum (Former Employee) Guest Services Manager: Western Botanical Garden (Former Employee)
	<b>Education</b>	Jane: Indiana State University – Bachelor's degree - 1995

## About ClearView CRM

Doubleknot's ClearView CRM is an established leader in nonprofit fundraising. ClearView helps nonprofits recruit, recognize and retain supporters, volunteers, members and donors with tailored communications at every touchpoint. Powerful reporting, dashboards and analytics support data-backed decision-making everywhere. With ClearView, you can be confident that every touch is on-brand, on-message and targeted for success.

**Learn more at**  
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