



**SPEKTRIX** 

Fundraising+

# Understanding Your Data

March 27, 2025 / 12pm EDT / 4pm GMT



# Presenters



**Jake Larimer**

Consultant, Fundraising  
Specialist  
he / him



**Sara Stevens**

Senior Consultant,  
Fundraising Specialist  
she / her



**Miriam Wright**

Senior Consultant,  
Fundraising Specialist  
she/her



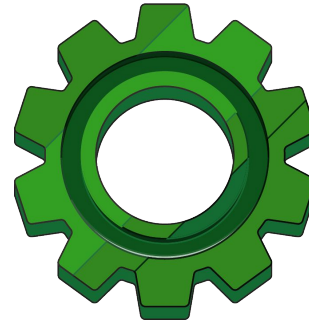
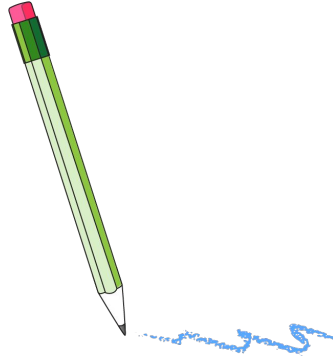
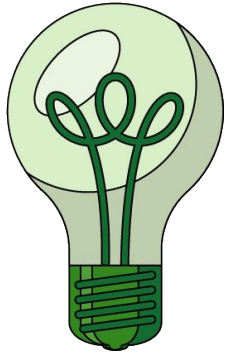
# Presenters



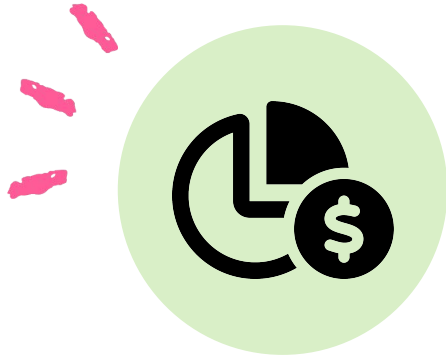
**Raice Bassett**  
Reporting Specialist  
he / him



# Information







# Understanding Your Data





# Agenda

1

Introduction

2

Entering Data

3

Your Toolbox

4

What to Ask

5

Challenge  
Biases



Tips and Guidance for Clean Entry

# Entering Your Data



You can only get data  
**out** of the system  
based on data that you  
put **into** the system.





# Data Cleanliness

How does data get messy?

- Importing Data Across Multiple Systems
- Staff Turnover
- Inconsistent Entry



# Quantitative Data



Choose an action:



52 customers in Customer List

Update count

**Name** Prospect List

**Description** Looking for prospects in high income zip codes who have never donated before

Audit trail

Drag segments to determine criteria:



drop here to delete



Not Top 5 NYC Zip Codes

AND



Not Never Donated

AND

# Qualitative Data

Activity:   Prospect Research

Donor Research *samantha*

FY24 > Individual > Memberships (Research)

## Tag Group

**Name** I'm interested in


**Description** Please send me information on the following when available.

**On web** ☒

 Edit

### Tags in group:

Name	Description	Auto tag	
<b>Musicals</b>		<input type="checkbox"/>	 
<b>Plays</b>		<input type="checkbox"/>	 
<b>New Work</b>		<input type="checkbox"/>	 
<b>Comedy</b>		<input type="checkbox"/>	 
<b>Dance</b>		<input type="checkbox"/>	 

 Add normal tag

 Add auto tag

# Donorly





# Donorly



**Weston Ganz**  
Head of Prospect  
Research and Strategy  
She/Her

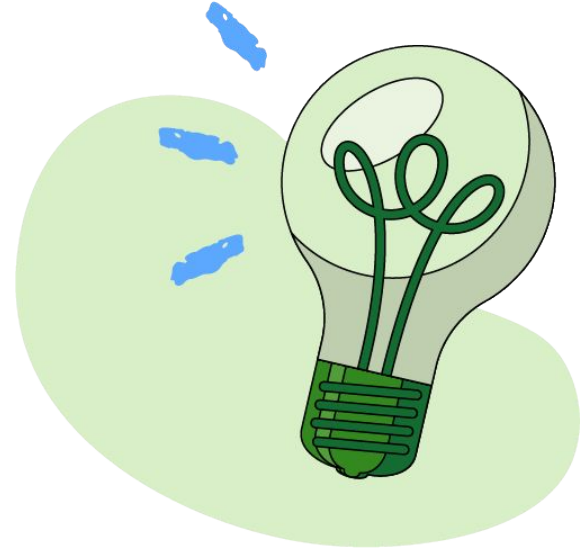


**Lauren Siff Siegel**  
Consultant  
She/Her



# Goal Setting

Translate Spektrix  
Data Fields to  
Accounting Data  
Fields





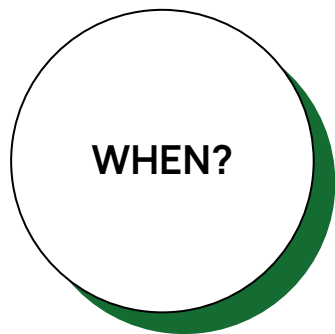
# Discovery

## Funds

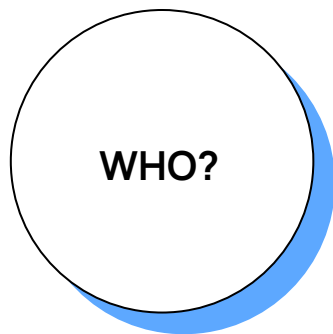
- General Operating - Individual
- General Operating - Board
- General Operating - Foundation
- General Operating - Government



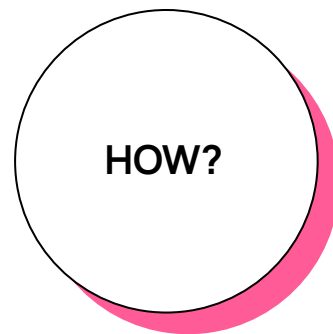




- Ex: financial years, project timeline
- What time period will you be raising for/reporting on?



- Ex: Individuals, Government
- What categories of donors do we want to track?



- Ex: EOY Appeal, Corporate Memberships
- What work did we do to raise those funds?



<b>Name</b>	FY25
<b>Start Date</b>	8/1/2024
<b>End Date</b>	7/31/2025
<b>Campaign code</b>	FY25
<b>Target Amount</b>	\$1,250,000.00

<b>Name</b>	Individual Giving
<b>Start Date</b>	8/1/2024
<b>End Date</b>	7/31/2025
<b>Campaign code</b>	505
<b>Target Amount</b>	\$560,000.00

<b>Name</b>	Giving Tuesday
<b>Start Date</b>	12/3/2024
<b>End Date</b>	12/3/2024
<b>Campaign code</b>	505
<b>Target Amount</b>	\$15,000.00

CAMPAIGN



SUB-CAMPAIGN



SUB-SUB-CAMPAIGN



# Campaign Summary Report

## CAMPAIGN SUMMARY REPORT

Campaign Name	Target	Donated	Pledged	Forecast	Total	%
FY25 > Individual > Annual Fund	\$150,000.00	\$76,250.00	\$5,675.00	\$12,500.00	\$94,425.00	62.95%
FY25 > Individual > Memberships	\$100,000.00	\$56,500.00	\$0.00	\$6,500.00	\$63,000.00	63.0%
FY25 > Individual > Recurring Giving	\$50,000.00	\$29,560.00	\$0.00	\$0.00	\$29,560.00	59.12%
FY25 > Individual > Giving Tuesday	\$25,000.00	\$26,129.00	\$150.00	\$0.00	\$26,279.00	105.12%
FY25 > Individual > Year End Appeal	\$45,000.00	\$48,654.00	\$2,000.00	\$2,000.00	\$52,654.00	117.01%
<b>Totals</b>		<b>\$237,093.00</b>	<b>\$7,825.00</b>	<b>\$21,000.00</b>	<b>\$265,918.00</b>	



# Discovery

“Spektrix is not just a tool for your fundraising and marketing teams, but a database that your **finance team** should also be comfortable with, too.

Getting **clarity** on how they look at data will help with your reconciliation, keep data organized, and improve communication.”

Weston Ganz  
Head of Research



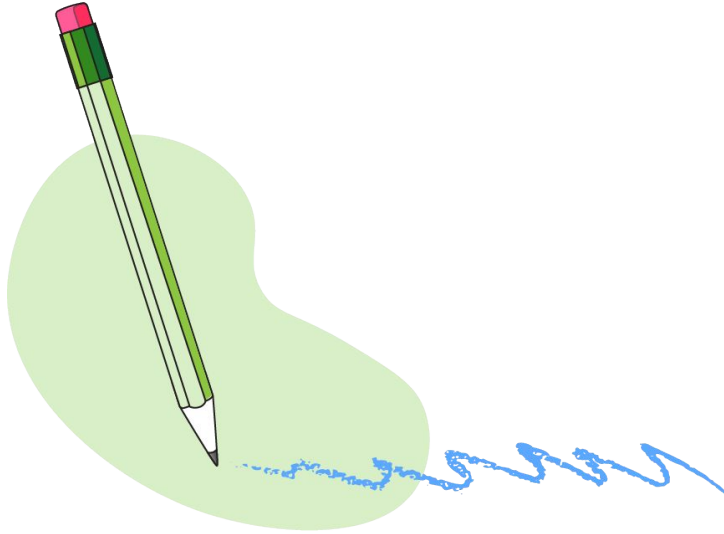
# Action

## Funds

- General Operating
- Education
- New Works
- Events
- Production Support
- Capital

## Campaigns

- FY25
  - Board Dues
  - Events
  - Gala
  - Individual Giving
  - Institutional Giving
    - Foundation Grants
    - Government Grants
    - Matching Grants



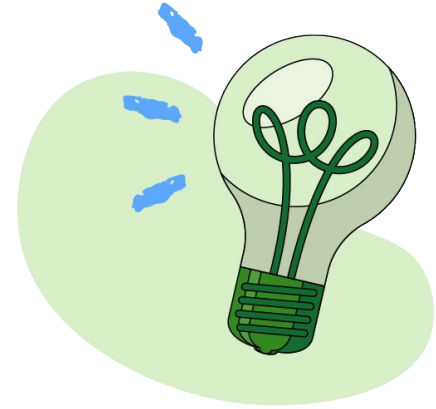
## Timing & Results

- New Fiscal Year
- Better Spektrix / Finance connection
- Ability to track success and progress



# Thank You

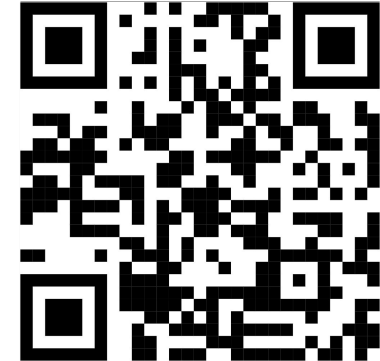
Thank you to our partners at **Donorly** for sharing their story. Scan the QR code to connect with them!



**Weston Ganz**  
Head of Prospect  
Research and Strategy  
she/her



**Lauren Siff Siegel**  
Consultant  
she/her





Based on your capacity

# Cleanup Tips

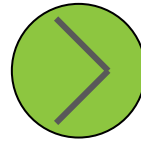




# One Hour

- Audit Existing Custom Reports
- Audit Existing Customer Lists
- Add Descriptions to:
  - Reports
  - Tags
  - Attributes





# One Day

- Assess Data Entry Paths
  - Customer Creation
  - Donation
  - Opportunities
  - Activities
- Consolidate tags



# One Week

- All of the above PLUS
- Flag Potential Duplicates
- Audit your Fund & Campaign Structure
- Engage with other teams
- Document Your Practices



# System Efficiencies: Analysing your data



Rachael Norris

Updated 3 months ago

Follow

Cleaning your data and making your system as efficient as possible is a great thing to do. This is especially true if you have been using Spektrix for a number of years or are thinking about embarking on **a consultancy project**.

In this article, we'll provide the steps and tools to undertake a full analysis of your **system efficiency**.



# Understanding Your Toolbox



# What are Customer Lists?

## What are they?

- A tool to segment your customers
- Filter your customers based on demographic and purchasing behaviour

Drag segments to determine criteria:

 drop here to delete

☐ Not Has attended 3+ events this year

AND

☐ Not Has donated \$50+ this year

AND



# When to use Customer Lists

- A quick count of customers
- CSV list of customer information
- Bulk adding / removing tags

483 customers in Customer List Update count

**Output Columns:**

<input type="checkbox"/>	Customer Id <input type="checkbox"/>	<input type="checkbox"/>	First Name <input type="checkbox"/>	<input type="checkbox"/>	Last Name <input type="checkbox"/>	<input type="checkbox"/>	Email Address <input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------------------	--------------------------	-------------------------------------	--------------------------	------------------------------------	--------------------------	--	--------------------------

**Action:** ☒ Apply ☐ Remove

**Tag group:**

**Tag:**



# When to use Customer Lists

- Send a Mailing

<b>Customer List:</b>	Prospective Donors	▼
<b>Email Campaign:</b>	Support Us	▼

- Run through a report



## **Donor Giving History**

A list of donors w/ a breakdown of their total, average, latest, and largest gift information

**Analysis**





# Reports

Reporting is a way of extracting data from your Spektrix system.

Data can be filtered based on Criteria and output into a document or spreadsheet.

Provide data that isn't limited to individual customers and include calculations for analysis.



## **Monthly membership activity**

Monthly membership activity for the last 12 months.



## **Campaign Summary**

A summary of your Campaigns



## **Donations Analysis**

Analysis, by sales channels, of proportion of transactions containing donations



# Report Types

Type:

Sales	Customer	Analysis	Accounting	Event Instances	Memberships	Opportunities	Campaigns
Pledges & Legacies	Customer Audits	Attendee	Invitees	Relationships	Soft Credits	Mailing ROI	T

Campaign reports show a row for every item related to each campaign.

Type:

Sales	Customer	Analysis	Accounting	Event Instances	Memberships
Pledges & Legacies	Customer Audits	Attendee	Invitees	Relationships	

Analysis reports show a row for each item sold or returned. Items include tickets, reservations, merchandise and gift-vouchers. Analysis reports are usually used by the box office and marketing.

Type:

Sales	Customer	Analysis	Accounting	Event Instances	Memberships
Pledges & Legacies	Customer Audits	Attendee	Invitees	Relationships	

Membership reports show a row for each membership. They can be filtered to show active or expired memberships. Membership reports are generally used by marketing and development.



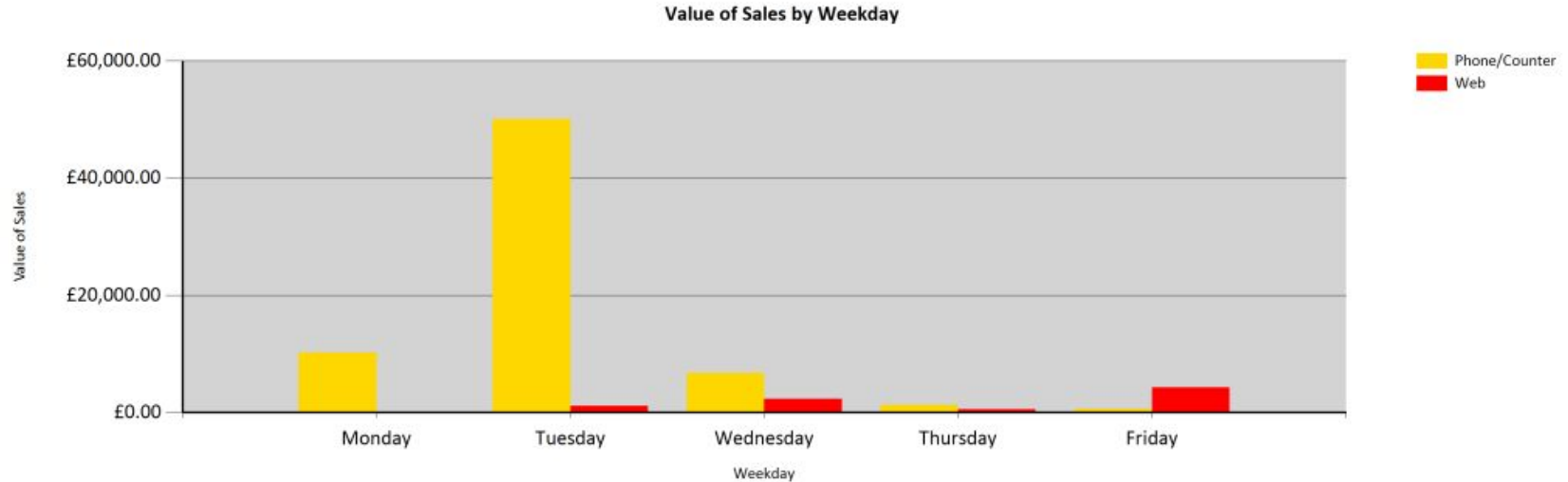
# When to use Reports

## CAMPAIGN SUMMARY REPORT

Campaign Name	Target	Donated	%	Pledged	%	Forecast	%	Total	%
FY 20252026	\$100,000.00	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
FY 20252026 > 25/26 Memberships	\$20,000.00	\$1,000.00	5.0%	\$4,000.00	20.0%	\$0.00	0.0%	\$5,000.00	25.0%
FY 20252026 > 25/26 Trusts and Foundations	\$10,000.00	\$6,000.00	60.0%	\$0.00	0.0%	\$0.00	0.0%	\$6,000.00	60.0%
<b>Totals</b>		<b>\$7,000.00</b>		<b>\$4,000.00</b>		<b>\$0.00</b>		<b>\$11,000.00</b>	



# When to use Reports





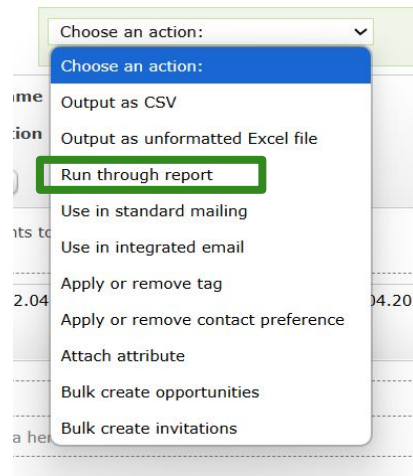
# Recap

If you need to **identify** your customers, for example prospective donors - Use a customer list

If you want to **output data on their behaviours**, for example donation amounts - use a report



# Customer Lists combined with reports



## Donor Giving History

Customer ID	Title	First Name	Last Name	City	Total Giving	Number of Gifts	Years Giving	Average Gift	Latest Gift Amount	Latest Gift Date	Largest Gift	Largest Gift Date
I-JP22-3FPD		Christopher	Parent	Croydon	£1.00	1	1	£1.00	£1.00	02/02/2018	£1.00	02/02/2018
I-JW22-4C3X		Claire	Wright	Croydon	£22,024.00	114	9	£193.19	£0.50	21/01/2025	£15,000.00	20/03/2023



# Unformatted Reports

**Output Columns:**

**Groups:**

Sales Channel

**Aggregate columns:**

Amount

Average

▼

Only Include Values:

From:

To:

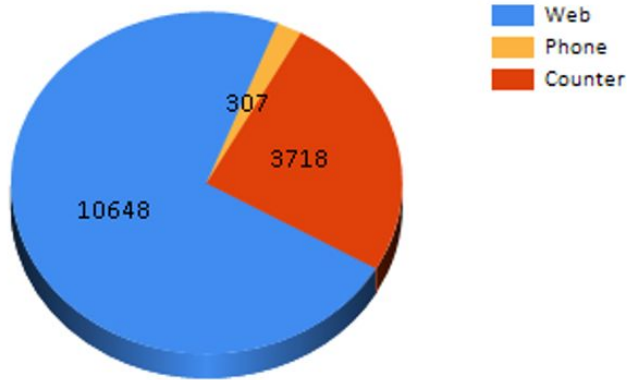
☒ Include Column

Sales Channel	Average of Amount
Phone	\$5.82
Counter	\$195.69
Web	\$5.70

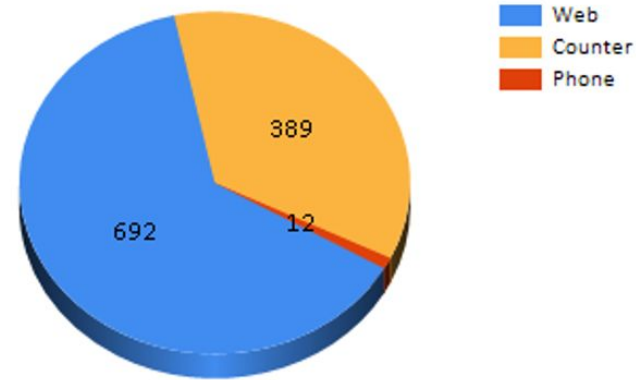


# Formatted Reports

Number of Transactions by Sales Channel



Number of Donations by Sales Channel



Transactions

Counter	Phone	Web	Total
3718	307	10648	14652
\$155,975.50	\$17,979.45	\$574,870.84	\$748,825.79

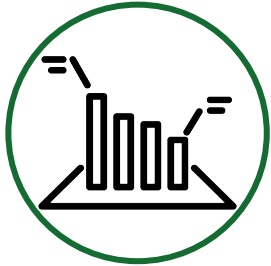
Donations

Counter	Phone	Web	Total
389	12	692	1093
\$31,187.00	\$54.50	\$2,709.39	\$33,950.89

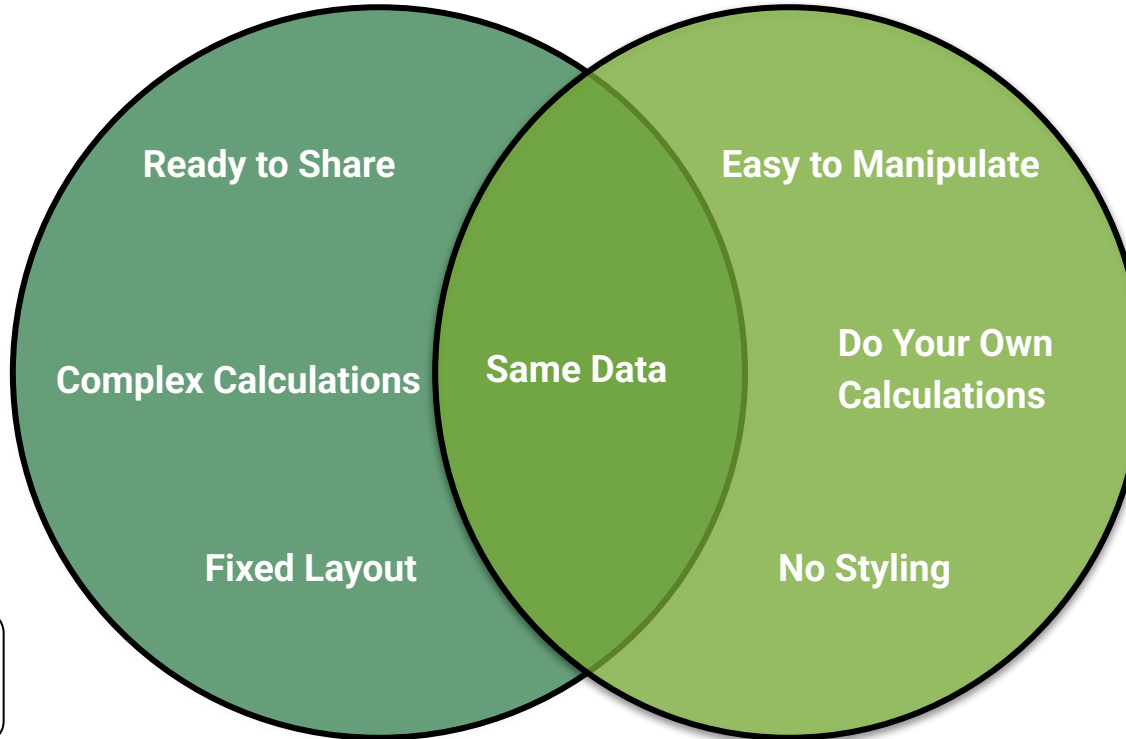




# Key Differences



**FORMATTED  
REPORT**



**UNFORMATTED  
REPORT**



# Understanding your Toolbox

## A Guide to Standard Reports in Spektrix



Harry Brett-Jones  
Updated 4 months ago

Follow

**Standard Reports** allow you to report on a wide variety of information about tickets, customers, events, sales, fundraising activity and much more.

In this article we've **collated and described the Standard Reports** so that you can quickly and easily locate the best report for your needs.

Before you read this article make sure you're familiar with:

- ✓ [Introduction to Reporting](#)
- ✓ [How to Run a Report](#)

### In this guide

#### How to Use this Article

Event Sales & Reservations

Ticket Sales Analysis

Customer Behaviour and Demographics

Accounting and Payments

Memberships

Campaigns, Opportunities, Pledges & Activities

Donations

Related articles

Recently viewed articles

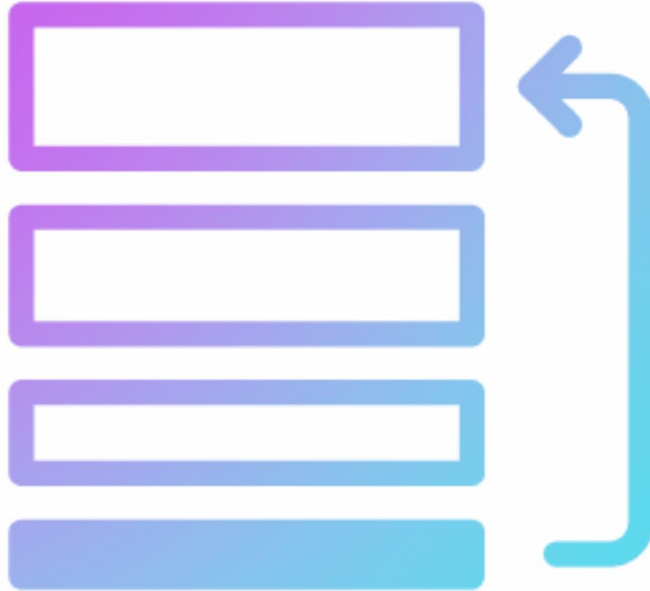


Asking the Right Question

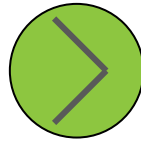
**Pulling Your Data**



# The Prep to Pull



- ☐ You **enter data into** your system so that you can **pull that data out** of the system
- ☐ Spektrix provides **different tools** to arrange that data in **different ways**
- ☐ *What do we need from this data anyways?*



# Crafting an Ask

**Develop a clear idea of...**

- What you want out of your ask
- How to best communicate your ask to this prospect (or report)
- What the likely outcomes of your ask will be



# What's in an Ask?

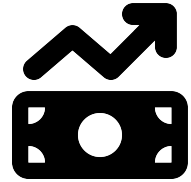
1

**Who** do we want to know about?



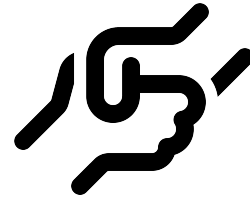
2

**What** do we want to know about them?



3

**How** are we going to use that information?





# The Ask in Practice

Can you pull a  
report of our  
\$1,000+ donors?



# Can you pull a report of our \$1,000+ donors?

## Who?

- Time period?
- Single donation amount or cumulative?
- Excluding funds or campaigns?

## What?

- How much they gave total?
- How much each individual gift was?
- Contact info?

## How?

- Asking donors to renew?
- Attaching benefits?
- Program listing/crediting donors?



What are the **names** and **emails** of our donors who have *cumulatively* given us **\$1,000 or more in the last year**, (excluding their donations to the gala fund)?

### Who?

Donors who have *cumulatively* given us \$1,000 or more in the last year

### What?

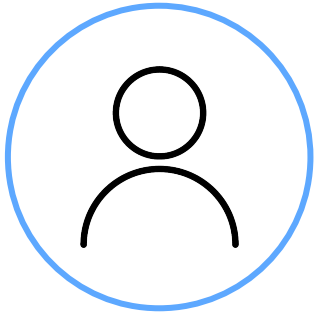
First name, last name, email address

### How?

Send personalized invites to our opening night reception to cultivate relationships with our higher level donors



# Asking Which Tool to use



**CUSTOMER  
LIST**



**UNFORMATTED  
REPORT**



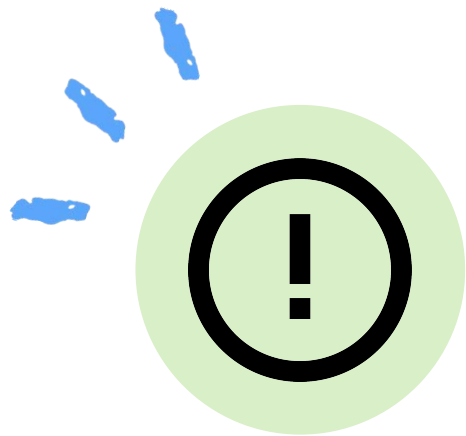
**FORMATTED  
REPORT**

“Asking open-ended questions is a great way to make hidden assumptions visible.”

**KEVIN HANEGAN**

Chief Learning Officer of Qlik  
& Chair of Data Literacy Project Advisory Board





What story is your data really telling?

# Challenging Your Data

# Why Challenge?

1

Data doesn't tell a story, humans tell stories based on data

2

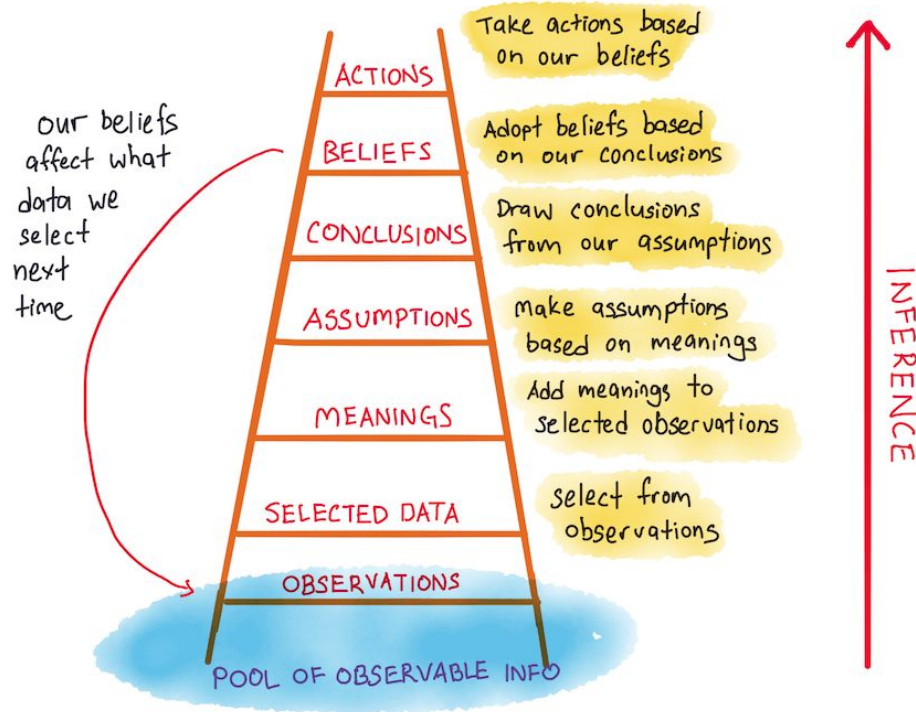
Humans are prone to assumptions!

3

Assumptions can lead to wrong conclusions...



# The Ladder of Inference

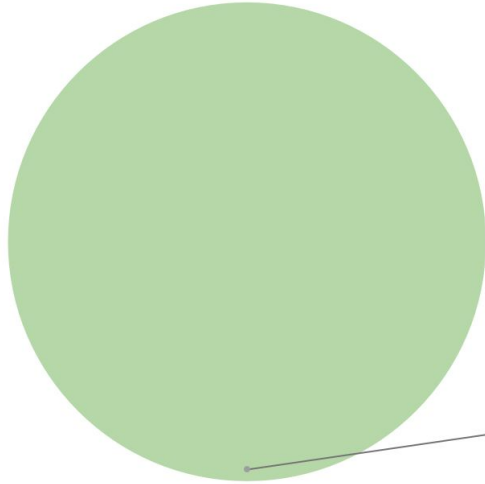


*Model by Chris Argyris (1923-2013)*



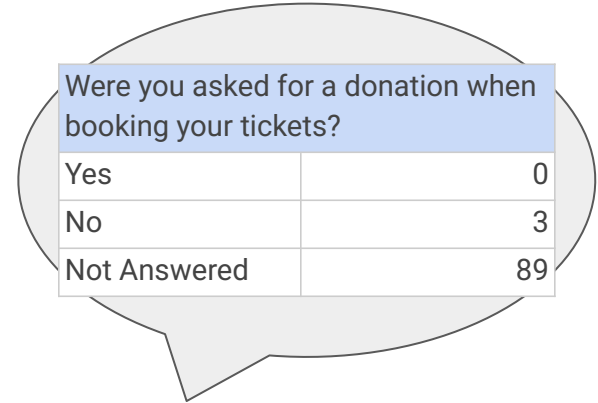
# Jumping to Conclusions

Were you asked for a donation when booking your tickets?



No  
100.0%

**OBSERVATION**



**ACTION**

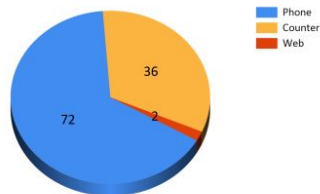


# Donation Analysis Report

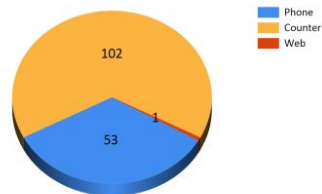
## Donations Analysis

Transactions from 05 January 2024 to 09 December 2024

Number of Transactions by Sales Channel



Number of Donations by Sales Channel



Transactions			
Counter	Phone	Web	Total
36	72	2	110
£65,185.85	£410,092.50	£126.00	£475,404.35

Donations			
Counter	Phone	Web	Total
102	53	1	156
£24,332.50	£404,123.00	£56.00	£428,511.50

## Conversion Ratios

### Spent V Donated

Sales Channel	Total Spend	Total Donated	% Converted
Counter	£65,185.85	£24,332.50	37.33%
Phone	£410,092.50	£404,123.00	98.54%
Web	£126.00	£56.00	44.44%
Total	£475,404.35	£428,511.50	90.14%

### Transactions V Donations

Sales Channel	No. Transactions	No. Donations	% With Donation
Counter	36	102	283.33%
Phone	72	53	73.61%
Web	2	1	50.00%
Total	110	156	141.82%

## Average Donation

£2,746.87





## Donation Amounts

Amount	Times Donated
£1.00	87
£3.00	1
£5.00	1
£10.00	2





# Donation Analysis Report

 	<b>Donations Analysis</b> Analysis, by sales channels, of proportion of transactions containing donations	<b>Analysis</b>	12/02/2025 10:32:48
<div>By Transaction Date  </div> <div><span>New criteria set</span> <span>Copy report</span></div>			



Average Donation: £2,746.87



% Donation Conversion Phone: 71%



Top Cashier for Donations: Jane Smith



# Donation Analysis Report

## Who?

What customer transactions are included in this report?

### Run Donations Analysis

#### By Transaction Date

Order Items with

**Accounting Date**

is

Last week



between 10/03/2025 and 16/03/2025

Run as PDF



Cancel



# Donation Analysis Report

## What?

What are the outputs in this report and what are they telling me?

### Fund Breakdown

Fund	Number	Amount
Bursary Fund	3	£15,003.00
Capital Fund	10	£55,455.00
Education Fund	2	£5,075.00
General Operating.	6	£92,550.00
In Kind Donations	1	£10,000.00
Membership Fund	63	£32,250.00
Support our Youth Theatre	5	£115,500.00

### Cashier Breakdown

User Name	Transactions	Donations	Transactions to
Jane Smith	76	63	83%



# Donation Analysis Report

## How?

How am I going to use  
this report?



Top level overview



Assessing all donations processed through  
the Spektrix system



# Continue the Ask

What are the **names** and **emails** of  
our **donors** who have given us  
**\$1,000** or more in the last year,  
excluding their donations to the gala  
fund, so I can email them an invite



# Continue the Ask

## Who?

Donors who have  
*cumulatively* given  
us \$1,000 or more  
in the last year

## What?

Details of donation  
history

## How?

Inform 1:1  
conversations at an  
event



# Donor Giving History Report

Choose an action: Update count

Choose an action:

- Output as CSV
- Output as unformatted Excel file
- Run through report**
- Use in standard mailing
- Apply or remove tag
- Apply or remove contact preference
- Attach attribute
- Bulk create opportunities
- Bulk create invitations

Name

Description

Audit trail

Drag segments to







☐ Not \$1.00

AND

OR

drop criteria here

drop here to delete

 	<b>Donor Giving History</b> A list of donors w/ a breakdown of their total, average, latest, and largest gift information	<b>Analysis</b>	10/06/2021 11:29:52
<div>Lifetime Donations (Use with Customer List)  </div> <div>Lifetime Donations - By Tag  </div>			
<span>New criteria set</span>		<span>Copy report</span>	

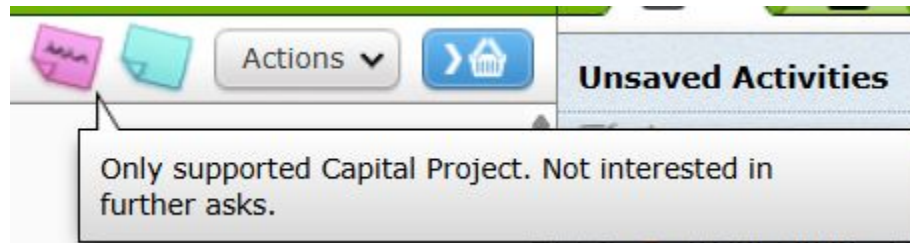


# Donor Giving History Report

## Donor Giving History

Accounting Dates between 01/05/2015 and 06/08/2030 | Report Generated on 17/03/2025 16:09

Customer ID	Title	First Name	Last Name	City	Total Giving	Number of Gifts	Years Giving	Average Gift
I-BX22-7SC8		Ruth	Brown	Manchester	£2,755.00	7	2	£393.57
I-X622-6MC2		Lowri	Jones	Stockport	£11,086.00	37	4	£299.62
I-F922-6COC		Victoria	O'Brien	London	£10,000.00	1	1	£10,000.00
I-7M22-84M7		Jane	Smith		£105,000.00	2	1	£52,500.00





# How can I Challenge?

1

Have I chosen the right data to look at, is my “ask” complete?

2

Is there any missing data? Have I considered all sources of the data?

3

What other meanings could there be?

4

Seek out other perspectives!





# Key Takeaways

You can only **get out** of your system what you **put into** your system

Your Spektrix toolbox can help you **arrange** your data to **tell a story**

Ask **specific questions** to get **specific answers**

**Challenge biases** when interpreting your data



# Asking for Donations

After the Asking For Donations Workshop, Edinburgh International Festival grew their one-off donors in the first year by

# 45%



“The data speaks for itself. *Asking for Donations* is an excellent way to **educate and build confidence** among seasonal members of the ticketing team..”

**SEBASTIAN KING**

Individual Giving Manager  
Edinburgh International Festival



# Philanthropy Series Webinar

October 29, 2025 / 12pm EDT / 4pm GMT





# Upcoming Events



**A.R.T. New York Spring Summit:** 4 April (New York, New York)



**PACTcon:** 21-25 May (Halifax, Nova Scotia)



**League of American Orchestras Conference:** 11-13 June (Salt Lake City, Utah)



**UK Theatre Conference:** 24 June (London, United Kingdom)



**AMA Conference 2025:** 9-11 July (Edinburgh, United Kingdom)

**SPEKTRIX** <<<

**HUBS 2025**



**EDINBURGH**

Friday, 30 May



**LONDON**

Monday, 2 June



**MANCHESTER**

Wednesday, 4 June

Coming Soon!

SPEKTRIX

HUBS 2025

US & Canada



**SPEKTRIX** 

**Thank You!**