Your Organizational Data Worksheet

This worksheet is a tool to help you take a snapshot of the data you collect and track for your organizing, communications, and fundraising work. Over time, your answers may change – this can be used as a living document that you update as your organizing work changes and you move towards better data practices.

We chose the language in the questions carefully. Even so, it might not match the language you use in your work. Change it as appropriate to match the language you use in your organizing work.

For each of these questions, be as *specific* and *detailed* as possible.

Organizing

1. Who do you organize? In other words, who are the different players that matter to the work you do? (e.g. the formerly incarcerated, day laborers, volunteers, etc.)

2. What activities do you conduct with those you organize (who you want to have relationships with)? (think about how people engage with your organization from how the enter your organization to how they become a "super" leader, donor, spokesperson, etc.)

3. What information do you always collect from *all* of these contacts?

☐ First name   ☐ Home phone
☐ Last name   ☐ Preferred method of contact
☐ Home address   ☐ Issue interest
☐ Home email   ☐ Other – explain:
☐ Work email
☐ Cell phone

4. Do you track how your contacts relate to each other and to other organizations? (i.e. contact person for a union or other community organizing group)

5. Do you track the activities your contacts/constituency participate in? List those activities.

6. How do you determine who your most active constituents/contacts are? If so, what criteria do you use and how do you capture that?

Membership

7. Do you have members?   YES   NO   *If not, skip this section on Membership.*

8. How do you define "member"?

9. What activities do you conduct with members ? (think about how members with your organization from how the enter your organization to how they become a "super" member, etc.)

10. Do you collect dues or offer free memberships? Please describe.

Communications

11. Who is/are your target audience(s)?

12. What activities do you conduct with these audiences? (e.g. e-newletter subscriptions, email alerts, e-actions, phone calls, ask for donations, etc.)

13. How do you segment your list or target your audiences for specific email lists, actions, issue topics, or fundraising campaigns, etc.?

14. Can you easily pull-up /identify / track your spokes people? If so, how do you identify and/or track them?

15. How often do you communicate to your entire list?

16. What methods do you use to communicate with your contacts / constituents? (Please check all that apply.)

- [ ] Email
- [ ] Phone
- [ ] Face-to-face
- [ ] Twitter
- [ ] Facebook
- [ ] Fax
- [ ] Print mail
- [ ] E-newsletters
- [ ] E-alerts
- [ ] E-advocacy
- [ ] Youtube
- [ ] Blogs
- [ ] Other – explain:

Fundraising

17. Who/what audiences do you target to ask for donations?

18. What activities do you conduct with these audiences? (e.g. phone calls, face-to-face, email, fundraising events, etc.)

19. What type(s) of fundraising do you do? (Check all that apply)

- ☐ grassroots
- ☐ individual donor
- ☐ foundation
- ☐ gala events
- ☐ peer to peer
- ☐ sustainers
- ☐ Other – please explain:

20. What kinds of information are you collecting and tracking about your donors and/or fundraising efforts?

- ☐ Donation amount
- ☐ Date of donation
- ☐ Donor type (e.g. major donor, student, etc.)
- ☐ Donor Level
- ☐ Donor status (e.g. new, current, lapsed, expired, etc.)
- ☐ Date of Last donation
- ☐ History of donation activities: What event / activity / campaigns they donated to
- ☐ Donor cultivation engagements (e.g. followup one-on-one calls with major donors)
- ☐ Total lifetime giving amount
- ☐ Number of donations (in the last year, over time, etc.)
- ☐ Other – please explain:

21. What are your measures to know you're going in the right direction with your fundraising work?

Assessing Leadership & Engagement

22. What criteria are you using to identify leaders? In other words, what activities listed in Question #2 are part of leadership development?

Your Organizational Data Culture

23. How often do you update key contact information of those you've identified as important to your organization's work? (e.g. Every time we talk to contacts, once every 6 months, only after events, etc.) Who does this?

24. List *all* the places where contact information could be found.

- ☐ Paper
- ☐ Electronic document
- ☐ spreadsheet program
- ☐ Database
- ☐ cell phone contacts
- ☐ Outlook/Gmail/individual email account
- ☐ Other – explain:

25. If your organization has more than one database, for what purposes does each of these databases serve?

26. Can everyone in your organization access *all* the data they need easily and quickly?