**Data Assist Wish List**

**Donor Database (Neon) Reporting and Analysis**

**Create Household reports in neon (or elsewhere) to show:**

* Top 100 donors excluding foundation grants but including gifts directed by donors that come thru donor advised funds or donor controlled family foundations
  + top donors this year, recent years, all years
* Major donor report (gifts $200 and over) including soft credits/gifts through foundations
* A report that shows both major donor gifts and all other gifts to date
* Campaign reports
  + YTD vs goal
  + Prior year v this year
  + Break out by tender (how people give - thru mail vs on line)
* Data for donor pyramid segmenting donors by year by gift range and providing a donor count and gift total for each range
  + $10,000 and up
  + $5,000 - $9,999
  + $1,000- $4,999
  + $300- $999
  + $200 - $299
  + $100 - $199
  + Under $100
* Geography of our donor base (city of donor)
* Valley Gives campaign
  + Attrition rates from year to year of donors who give only thru valley gives - %
  + List of donors each year who give for the first time during VG and then give again outside of the campaign - and as % of total VG donors
  + What can we predict for our valley gives campaign next year
* Sustainers Reports
  + How many have lapsed each year - # and as %
  + How many are new each year
  + How many are currently active
  + What is projected total from all sustainer gifts (monthly and quarterly) this year
  + How about next year given expected attrition and addition
* Sponsorships, In Kind donations
  + How can we use neon to track and record sponsorships for events and GTC generally - inkind and $ gifts
  + How can we use neon to track inkind donations generally
* Volunteers
  + How can we use neon to manage one time and continuous volunteers without adding unnecessarily to our database and increasing the costs of our mailings - any recommendations?

Can the dashboard in neon be modified to show any of these metrics?

**Donor Data Analysis:**

Trends over time

* Numbers of donors
* Size of gifts
* Changes in gift ranges (pyramid)
* Movement of donors into higher ranges (identify people to cultivate)
* Sustainer gifts
* Geographic trends
* Campaign trends

Any other trends/analysis that you all see as interesting or striking in terms of giving patterns or what this data shows about our donors and their giving and what it might mean for fundraising or donor cultivation strategies

Any recommendations you all have about how to maximize our use of neon - what can we do to better use its full capacity and organize our reports and info efficiently

**Square data analysis**

We have data for 2016 and 2017 YTD

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(Transactions File)

We need to view this data as a whole and segmented by market. Markets can be tracked by days of the week:

* Wednesday: GTC EATS additional sales
* Thursday: Farmstand sales
* Saturday: City Soul Market sales

(Transactions File)

We are interested in tracking by market and overall:

* Gross sales
* #s of transactions (customers) (Some could be aggregated transactions)
* Average transaction amount
* Trends over time in **sales** and **#s of transactions** - how do they vary throughout the month and over the season (
* New and returning customers (see customer response only for 2017)
* Each market as % of total sales and total transactions (PIE CHARTS)!!!

Seeing this visually as well through numbers would be great.

Note: Some of our transaction data is off this year b/c youth have been inputting several sales at once when sales table gets backed up, so it looks like fewer customers.

(Items File)

Also would be good to see: **Radio button for yearly, monthly, weekly (Optional, focus on yearly)**

Top sellers - top 10? (Bar Chart)

Sales by category (Table)

Sales by items overall and either weekly or monthly (Click on category to get item breakdown) (Click category in table to get chart)

Comparison 2016 to 2017 (Yearly view) (Table)

In 2016 if we estimate that 60% of our customers are returners each week and 40% are new for Thurs and Sat markets, how many customers did we sell to? (Wed market is for farm share members so they are all returners for the most part)