

March 25, 2026

From Case Data to Case for Support

Leveraging Data to Strengthen Fundraising



S.E. BARRETT
CONSULTING
FULL-SERVICE FUNDRAISING ADVISORS

CaseWorthy™



Speakers



David Lewis

VP of Industry Leadership,
CaseWorthy

dlewis@caseworthy.com



Susan E. Barrett, Ed.D.

SE Barrett Consulting
sebarrettconsulting@gmail.com

Erica VanLandingham

SE Barrett Consulting
team.sebarrettconsulting@gmail.com

Session: Logistics Overview

This 45-minute session will provide insights into leveraging data for fundraising success. A Q&A segment will follow; we'll periodically ask poll questions. Please feel free to submit questions at any point during the presentation.



“

You already have the data.
You're just **not using it for fundraising.**

CaseWorthy Solutions

EMPOWERING DATA FOR IMPACTFUL DECISIONS

Mission-Driven

CaseWorthy provides mission-driven data solutions that help organizations track their impact effectively, ensuring that their efforts lead to meaningful outcomes in their communities.

Impact Tracking

By supporting robust impact tracking, CaseWorthy enables organizations to understand the effectiveness of their programs, allowing for data-informed adjustments and improved service delivery.

Better Reporting

With enhanced reporting capabilities, CaseWorthy allows organizations to present their data clearly and compellingly, fostering transparency and trust among stakeholders and funding partners.

SEBC Overview

EMPOWERING FUNDRAISING THROUGH DATA INSIGHTS

Fractional Fundraising

SEBC offers fractional fundraising services, enabling organizations to access expert guidance without full-time commitments, ensuring strategic focus on maximizing fundraising outcomes.

Case Development

Our team specializes in case for support development, crafting compelling narratives to articulate funding needs and engage stakeholders effectively, enhancing the potential for successful fundraising initiatives.

Data Storytelling

We leverage data storytelling to transform complex data into engaging narratives, helping organizations communicate impact clearly and persuasively to attract and retain donor support.

Objectives

KEY GOALS FOR THIS SESSION.

Data Importance

Understanding the significance of data is crucial; it informs decisions, maximizes impact, and strengthens fundraising efforts by providing insights into community needs and organizational capabilities.

Fundraising Framework

A structured approach to fundraising ensures clarity in strategy. It encompasses defining objectives, understanding the audience, and aligning resources for maximum outreach and effectiveness.

Building Support

Crafting a compelling case for support is essential. It requires integrating data-driven insights, impactful storytelling, and clear communication to engage stakeholders and encourage investment in your mission.

The Gap

PROGRAM

Intakes

Services

Outcome

FUNDRAISING

What Changed?

Who Benefited?

Why Invest?

Why Data Matters

In today's landscape, funders expect proof of impact.

Leveraging data builds trust and strengthens narratives, demonstrating that a compelling story alone isn't sufficient for effective fundraising.



Your System is a Strategic Asset

- **Centralized data** provides real-time insights that enhance outcome reporting.
- **Leveraging your system** effectively ensures you maximize resources and demonstrate impact, building trust with funders through transparent data management.



High-Value Data Insights



Audience

Understanding who you serve enhances engagement.



Deliverables

Clarity on what you deliver attracts funders.



Impact

Measuring changes illustrates real-world effectiveness and value.



Trends

Analyzing trends informs future strategies and goals.



Efficiency

Streamlining processes improves overall organizational performance.

Shifting Focus from Compliance to Impact

Compliance → Did we do it?

Fundraising → Did it matter?



Data Quality

ESSENTIAL ELEMENTS FOR ACCURATE DATA

Clean

Ensuring data cleanliness is crucial; it eliminates inaccuracies and enhances reliability, allowing organizations to draw meaningful insights from their datasets for improved decision-making.

Consistent

Consistency in data formats and definitions fosters clarity among stakeholders, enabling more effective communication and collaboration. This guarantees that everyone interprets data in the same way.

Shared Definitions

Establishing shared definitions across teams is vital for effective data utilization. This alignment guarantees that all members understand metrics and terminology, minimizing confusion in reporting and analysis.



Framework

NEED: Defining the Problem Clearly

01

Define Problem

02

Who is Affected

03

Trends



Approach

- Program model
- Client journey
- Services



Evidence

- Outcomes
- Improvements
- Scale



Vision

- Stories
- Testimonials
- Human impact



Investment: Understanding Investment in Outcomes

Analyzing the cost per outcome is crucial for maximizing growth and ensuring sustainability.

Focusing on demand helps organizations strategically allocate resources to achieve impactful results effectively and efficiently.





How Else Can You Use
This Data?

Grants Overview

UNDERSTANDING FUNDING IMPACT AND NEEDS

Outcome Stats

Funding outcomes should be measurable and clear. Highlighting statistics demonstrates the effectiveness of programs and facilitates informed decisions by stakeholders and funders alike.

Geographic Need

Analyzing local needs ensures that resources are allocated effectively. Geographic analysis helps identify areas that require attention, maximizing the impact of grants on the community.

Scale

Scaling successful initiatives is crucial for impact. Understanding the potential for growth enables organizations to expand their reach, enhancing sustainability and funder engagement for future projects.

Engaging Major Donors Effectively

Highlight the **impact of donations** by showcasing snapshots of success stories, demonstrating ROI through data-driven insights, and outlining measurable outcomes that resonate with potential major donors' interests and values.



Engaging Reports for Impact

Effective reports combine **impact briefs** and visuals to present compelling data.

By showcasing donor reports creatively, organizations can enhance understanding and communicate results effectively to stakeholders, driving engagement and support.



Aligning Team Messaging

Effective alignment of messaging among board members enhances organizational impact. By clearly defining support asks, teams can present a unified front, fostering trust and collaboration with stakeholders and funders throughout the fundraising process.



SEBC Framework

STEPS TO EFFECTIVE FUNDRAISING STRATEGY

01 Audit

02 Identify Metrics

03 Build Narrative

04 Visualize

05 Align

06 Package

Barriers to Effective Data Use

UNDERSTANDING COMMON OBSTACLES IN ORGANIZATIONS

Compliance Mindset

A strict compliance mindset can stifle innovation, leading organizations to prioritize adherence to regulations over leveraging data for impactful decision-making and fundraising efforts.

Data Silos

Data silos create fragmentation, preventing teams from accessing and sharing critical information effectively, which limits collaboration and hinders comprehensive insights essential for fundraising success.

No Integration

The lack of integration among various systems can result in inefficiencies, making it challenging to obtain a unified view of data, ultimately affecting strategy and outcomes.

Essential Services

Case Development

Our case development services help organizations articulate their mission and impact, ensuring that your narrative resonates with potential funders and stakeholders effectively.

Infrastructure

We provide robust infrastructure solutions that streamline data collection and management, enabling organizations to operate efficiently and focus on their core mission without unnecessary distractions.

Workshops

Our interactive workshops empower teams with the skills and knowledge needed to leverage data effectively, fostering a culture of continuous improvement and strategic thinking within your organization.

Strategy

Our strategy services offer interactive workshops designed to equip teams with essential skills and knowledge for effectively leveraging data. These sessions foster a culture of continuous improvement and strategic thinking, enhancing your organization's ability to adapt and succeed.

Key Takeaways

INSIGHTS FOR EFFECTIVE DATA UTILIZATION

You Have Data

Every organization possesses valuable data; recognizing this resource is vital for enhancing fundraising efforts and strategic decision-making within your organization.

Translate It

Transforming raw data into actionable insights is essential; leveraging analytics helps articulate your organization's narrative and demonstrates its impact on stakeholders effectively.

Use Strategically

Implementing a data-driven approach ensures that your fundraising strategies are informed by real evidence, allowing for increased trust from funders and greater organizational success.

Call to Action

STEPS TO LEVERAGE YOUR DATA

Run Audit

Conducting a detailed audit will help you understand existing data processes and identify areas for improvement, ensuring you maximize the potential of your resources.

Build Report

Create comprehensive reports that articulate your findings, providing stakeholders with clear insights and actionable recommendations based on the data collected throughout the audit process.

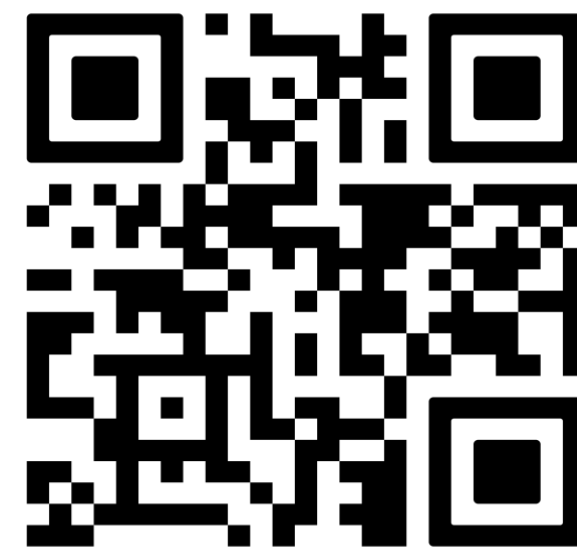
Align Teams

Fostering collaboration among your teams is key; ensure everyone understands their role in utilizing data effectively and works towards common goals for enhanced fundraising success.



**THANK
YOU!**

Q&A



S.E. BARRETT
CONSULTING

FULL-SERVICE FUNDRAISING ADVISORS

SEBC Contact

Email: sebarrettconsulting@gmail.com

Website: sebarrettconsulting.com

Let's leverage our data together