



# Visualising your data with Donorfy

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# I'm Graham

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## AGENDA

- Why Dashboards
- What can dashboards be used for
- Example of Dashboards
- Creating your Dashboards
  - Planning
  - Great Lists!
- Live Demo
- Reporting beyond Dashboards

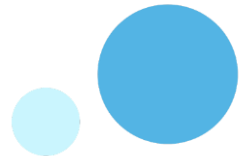




# Why Dashboards?

# Why would I create a Dashboard?

- Handy snapshots to visualise your data
- Monitor key metrics and trends
- To inform and empower users within the Organisation to make data-driven decisions
- To track performance of Giving, Volunteering and other programs within your organisation

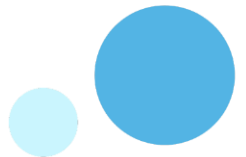




What can  
Dashboards be  
used for?

# What can Dashboards be used for?

- Track your Fundraising Campaigns
- Track Organisational Finance
- Track Number of Volunteers
- Tracking Events
- etc.....



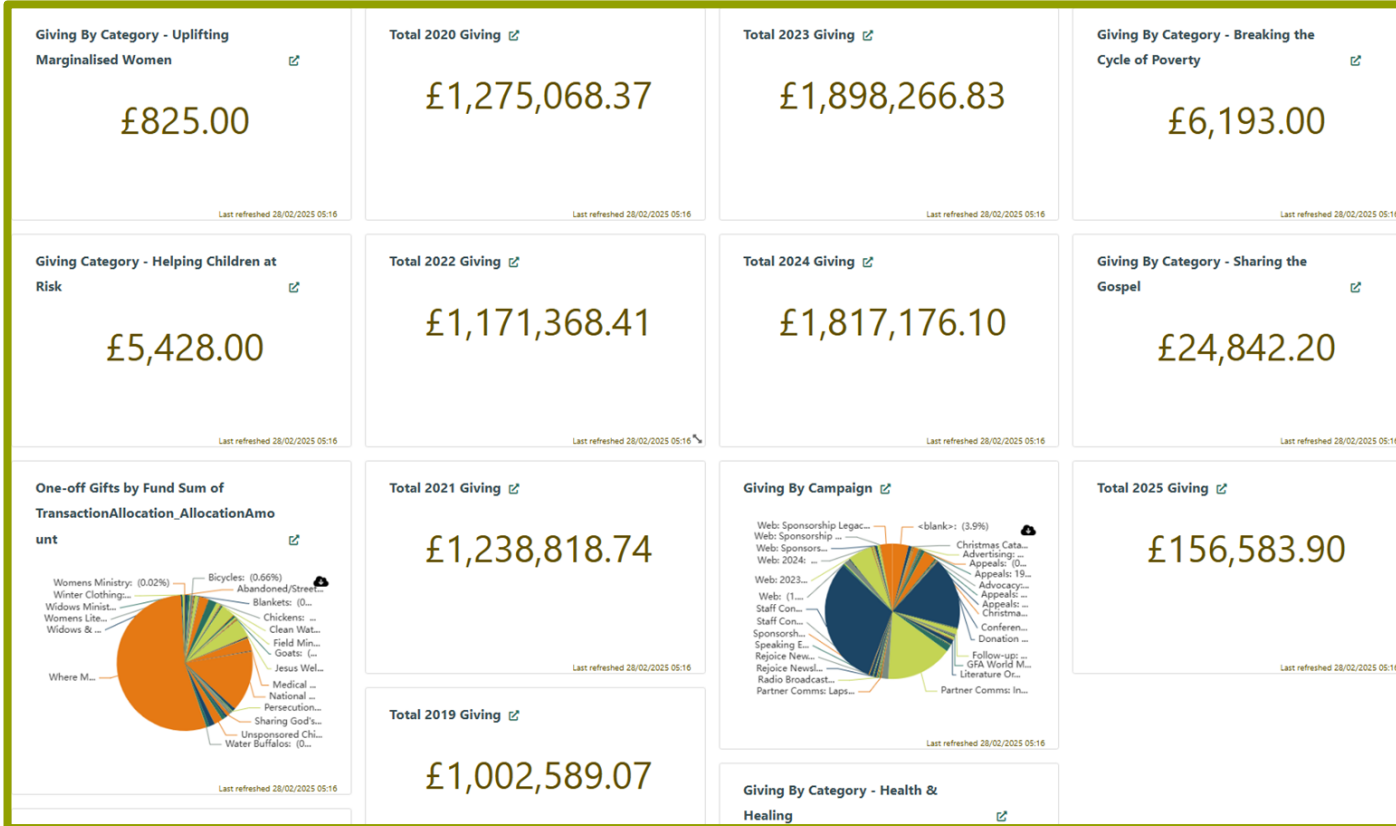




# Example Dashboards

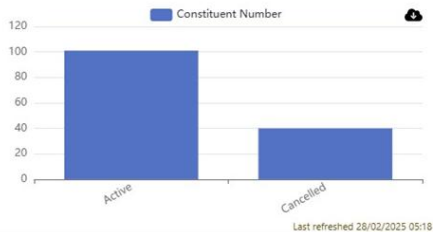


# EXAMPLES

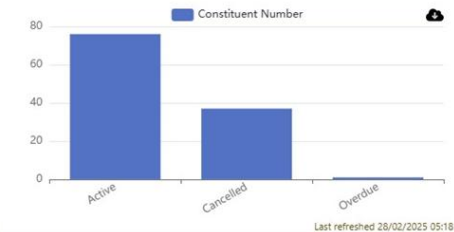


# EXAMPLES

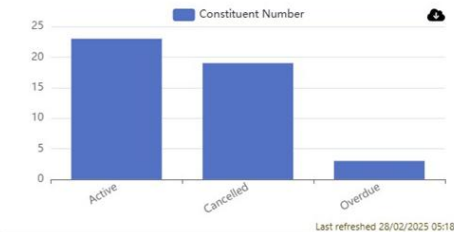
RPI Started in 2024 - Active vs Cancelled [↗](#)



RPI Started in 2023 - Active vs Cancelled [↗](#)



RPI started in 2022 - Active vs Cancelled [↗](#)



Regular Giving Total 2024 [↗](#)

£62,671.58

Last refreshed 28/02/2025 05:18

Regular Giving Total 2023 [↗](#)

£70,960.76

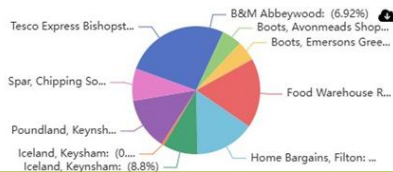
Last refreshed 28/02/2025 05:18

Regular Giving Total 2022 [↗](#)

£70,173.82

Last refreshed 28/02/2025 05:18

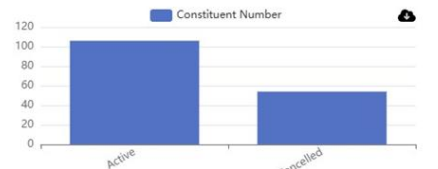
Canvassing locations [↗](#)



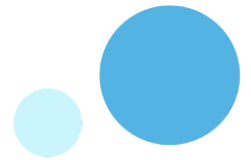
Total RG Canvassing Income [↗](#)

£5,045.00

RG Canvassing Active Vs Cancelled [↗](#)



# EXAMPLES

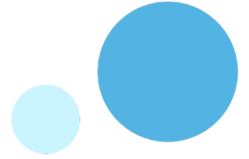


<p>1b) Email Addresses - Preferred Channel but No Valid Email <a href="#">↗</a></p> <p>72</p> <p>Last refreshed 25/02/2025 05:18 <a href="#">↗</a></p>	<p>2a) Gifts - Missing Processing Cost <a href="#">↗</a></p> <p>0</p> <p>Last refreshed 25/02/2025 05:17</p>	<p>5a) Addresses - Missing Town <a href="#">↗</a></p> <p>656</p> <p>Last refreshed 25/02/2025 05:17</p>	<p>5b) Address - Change of Address Email to Send <a href="#">↗</a></p> <p>1</p> <p>Last refreshed 25/02/2025 05:17</p>
<p>4a) Gift Aid - Verbal Declaration without Confirmation <a href="#">↗</a></p> <p>0</p> <p>Last refreshed 25/02/2025 05:18</p>	<p>2c) Gifts - Unassigned Donations <a href="#">↗</a></p> <p>5</p> <p>Last refreshed 25/02/2025 05:18</p>	<p>1a) Email Addresses - Active but No @ <a href="#">↗</a></p> <p>4,214</p> <p>Last refreshed 25/02/2025 05:17</p>	<p>2b) Gifts - Unacknowledged DDs (3/3) <a href="#">↗</a></p> <p>11</p> <p>Last refreshed 25/02/2025 05:18</p>
<p>2d) Gifts - Missing Department <a href="#">↗</a></p> <p>15</p> <p>Last refreshed 25/02/2025 05:17</p>	<p>3a) Tags - Prospective Fundraiser/Supporter with Gift/Soft Credit <a href="#">↗</a></p> <p>0</p> <p>Last refreshed 25/02/2025 05:18</p>		





# Planning Dashboards

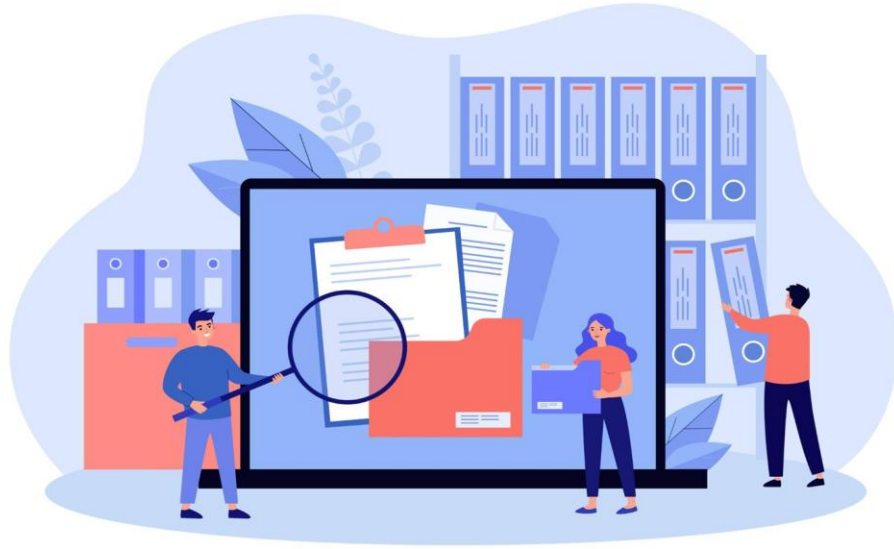


# Planning

- Work out what questions you need to answer on your dashboard
- Plan the lists that you need and work out how you are going to create them
- Put your visualisations on your dashboard
- Share with your colleagues - using Dashboard permissions



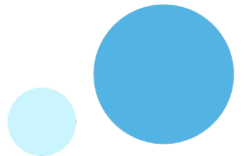
# What Are Lists?



# Why would I create a List?

To group data together and then do something with that data...

- **Example:** You may want to group together some supporters to send them an email
- **Example:** The fundraising team may want to group together some transactions to give to the Finance Team to see how much money is coming in



# What type of List do I need?

"I need all the *something* with *something* in common."

- I need all the constituents with the tag 'volunteer' in common - **Constituent List**
- I need all transactions with donations from Trusts in common - **Transaction List**
- I need all the opportunities with open major gift asks in common - **Opportunities List**





Demo



# Next Steps

- Knowledge Base / Donorfy Blog on Visualisations
- Network today / Donorfy Chat
- Ask Support
- Other Reporting Tools like Excel and PowerBI





**Any questions?**



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