

You Can Revolutionize Your Fundraising Analytics Using Claude

July 2026

Webinar Speakers



MODERATOR

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The NonProfit Times

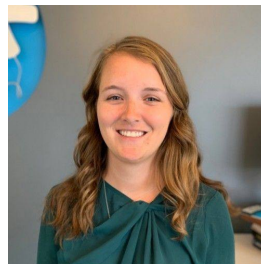


PANELIST

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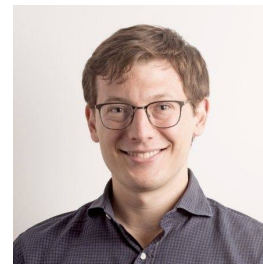


PANELIST

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Director - Applied
Data Science

Civis Analytics



PANELIST

Dan Wagner

Founder & CEO

Civis Analytics

Our mission:

We bring data science and AI to nonprofits around the world.

Our founders led the Obama Analytics team, and for more than a decade we've helped mission-driven organizations turn data into impact.

Today, we provide the trusted data platform and deep expertise nonprofits need to put AI to work.

Trusted by some of the world's largest nonprofits





Our agenda:

- 1 The nonprofit data challenge
- 2 How fundraising and marketing leaders can use AI for data
- 3 What makes AI work in practice
- 4 Where to start



Why we're here: We have to rethink how we work with data.

Marketing returns are declining - but we can't easily identify efficiencies.

We don't fully understand what motivates our supporters - or which messages actually work.

We struggle to measure attribution - and optimize investment.

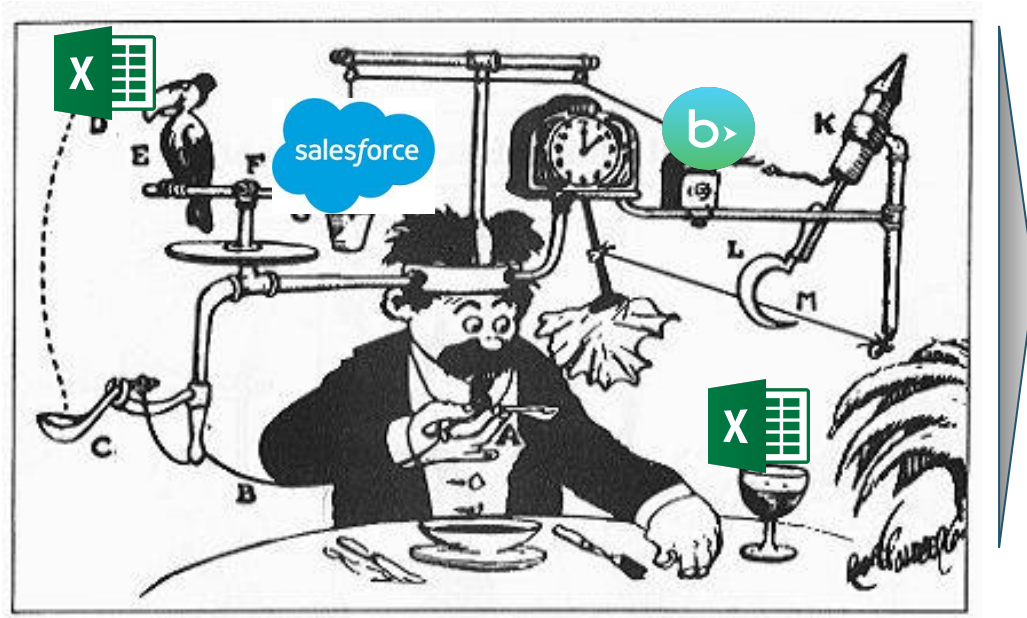
We still manage donors transactionally - RFM has reached its limits.

It should be easier than this:



Or this:

Marketing



...The 10-Tab Monster

Task	Status	Start Date	End Date	Cost
2 Training Task	Planned	2017-02-01	2017-02-01	17.00
22 RDV Task	Planned	2017-02-01	2017-02-01	12.00
23 RDV Task	Planned	2017-02-01	2017-02-01	16.00
24 Vacation Unavailab	Planned	2017-02-01	2017-02-01	17.00
6 Collaborate Task	Confirmed	2017-02-01	2017-02-01	17.00
10 Training Task	Confirmed	2017-02-01	2017-02-01	17.00
12 Sick Leave Unavailab	Planned	2017-02-01	2017-02-01	17.00
13 Training Task	Planned	2017-02-01	2017-02-01	17.00
19 Visit Task	Confirmed	2017-02-01	2017-02-01	17.00
25 Task	Planned	2017-04-01	2017-04-01	10.00
20 Meeting Task	Finished	2017-04-01	2017-04-01	12.00
7 Inofficial Task	Finished	2017-04-01	2017-04-01	13.00
17 Meeting Task	Planned	2017-04-01	2017-04-01	12.00
17 Meeting Task	Planned	2017-04-01	2017-04-01	12.00
8 Forecast Task	Planned	2017-04-01	2017-04-01	15.00
4 Visit Task	Finished	2017-04-01	2017-04-01	17.00

How has this not changed in 20 years...?

And...what can we do about it?



What a modern AI data system looks like:

3 AI LAYER — WHAT YOUR TEAM CAN DO



Analyze & report on your own

Questions in — answers and dashboards out. **No waiting on an analyst.**
Ask in plain English, then drill in and share.



Build tools, no code

Apps and copilots built **for your team's day-to-day.**
Describe what you need — no engineers required.

MCP — the secure connection

2 CONTEXT LAYER — BETWEEN YOUR DATA & THE AI

Teaches the AI what your data actually means

CONTEXT FROM THE MARKETING TEAM

"A 'lapsed donor' hasn't given in over a year. A 'major donor' gives \$1,000+."

CONTEXT FROM THE DATA TEAM

"This date is when we entered the gift — not when it actually came in."



1 DATA LAYER — ALL YOUR DATA, UNIFIED

One clean, trusted place for all your data

ALWAYS CURRENT

Synced automatically — nothing to reconcile by hand.

HARDENED & ACCESS-CONTROLLED

Everyone sees only the data they need, with robust permissions.

SOURCE SYSTEMS — WHERE YOUR DATA LIVES TODAY

• Salesforce

• HubSpot

• Excel

• Google Ads

• BigQuery

• Adobe Analytics

• NGP VAN

• Bonterra

AI is a collaboration between Marketing and Data



*Marketing & Fundraising
Team*

Industry expertise



*Data Team (or data
partner)*

Technical expertise

How fundraising and
marketing leaders can use AI





After 20+ years of dependency, we can now get answers through conversational prompts and also build dashboards on

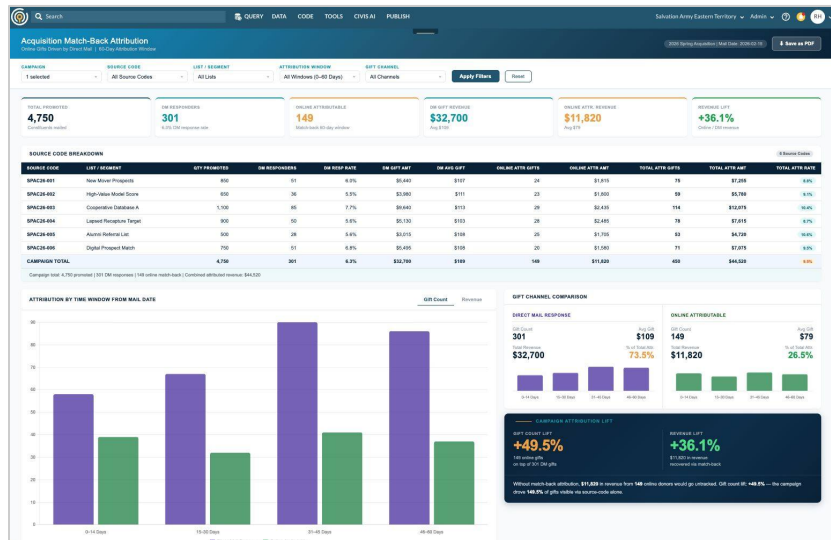
our

"Please build me an acquisition matchback report - online gifts driven by direct mail."

The primary inputs needed are:

1. Campaign results data
2. Donation/gifts table
3. Donor monster file
4. Promotional finder

The goal is to identify people who received a direct mail piece then transacted online within 60 days"



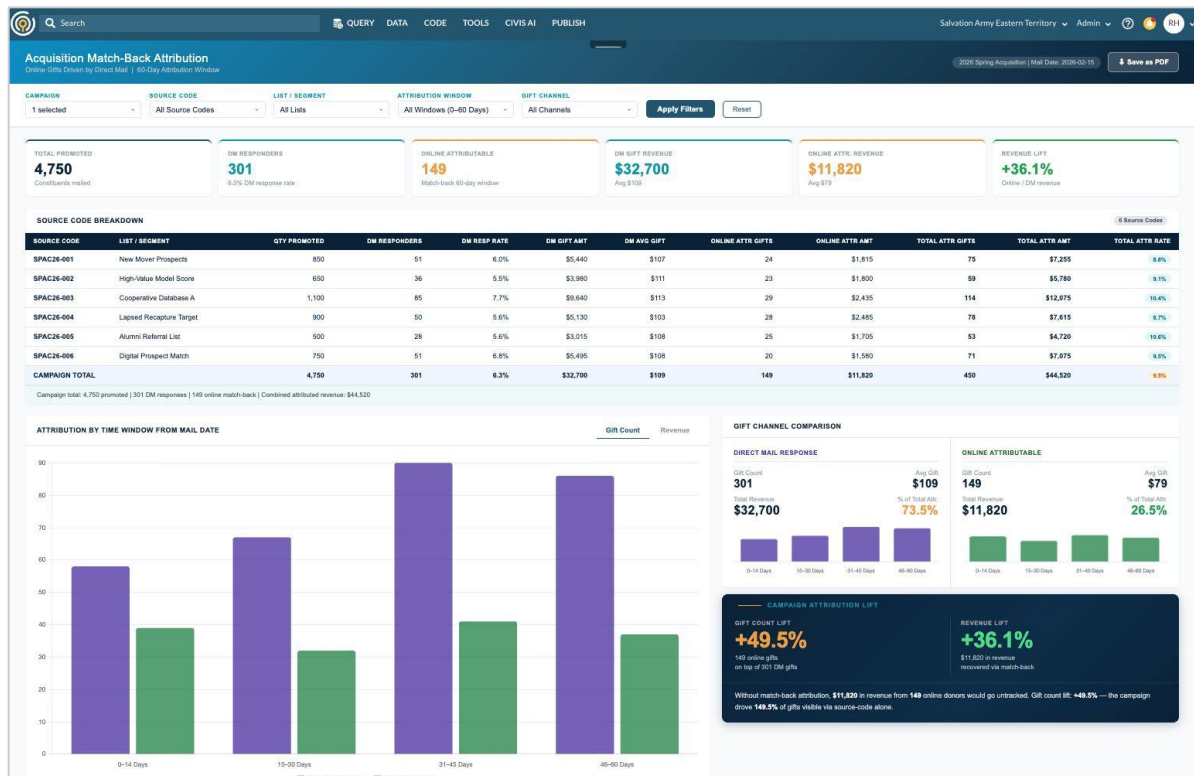
Prompt, iterate, and post for team members



Use Case: Acquisition Match-Back Report



Use Case: Acquisition Match-Back Attribution report





I started with a detailed prompt with goals and inputs:

I'd like to build a new dashboard called "Acquisition Match-Back Attribution - Online Gifts Driven by Direct Mail"

The primary inputs needed for this report will be:

1. Campaign Results database/table
2. Donation/Gifts table
3. Consituent/Donor Master file with PII data
4. Acquisition Promotional Finder # file with PII data

The goal of this report is to identify people who had received a direct mail piece but then transacted online within a 60-day time range from campaign mail date. The goal is to be able to identify how many gifts and the total gift amount that could be rightfully attributed to that particular direct mail campaign.



That turned into a back and forth conversation ...

Good, I found the previous dashboard. Let me read it to understand its filtering structure before building the new one.

Ran 5 commands, read a file, used a tool

I've reviewed the Campaign Responder Details Dashboard to understand its filter structure and design patterns. Before I build, I have a few questions to make sure the new dashboard hits the mark:

What output format should this dashboard be?

Both HTML + Excel

For the attributable gifts summary, what primary views do you want to see?

Source code breakdown, Time-window breakdown, Gift channel comparison, Donor-level detail table

Should the dashboard use mock/sample data (like the other dashboards) while waiting for real data integration?

Mock data (Recommended)

I now have all the context I need. Let me read the xlsx skill and then build both deliverables.

Read 2 files

Good. Now I have everything I need. Let me build both files.



Claude produced a strong 'version 1', but it needed chart help

[View Interactive HTML Dashboard](#)

[View Excel Workbook](#)

What's in the HTML dashboard:

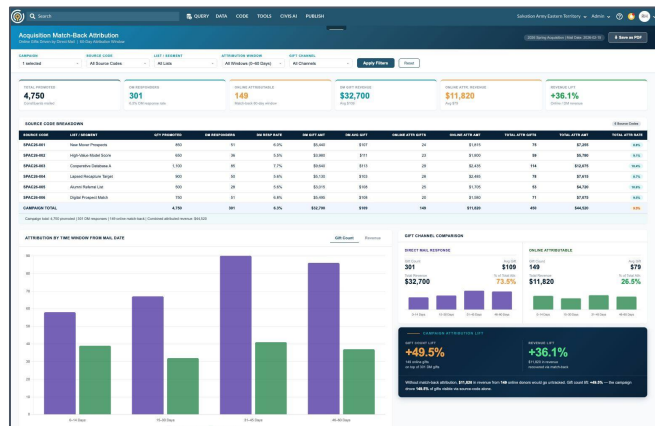
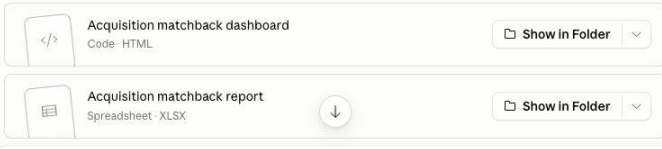
The dashboard auto-loads the 2026 Spring Acquisition campaign on open. It includes four filter controls (Campaign, Source Code, Attribution Window, Gift Channel) that work together. Switching campaigns repopulates the source code dropdown dynamically.

The six KPI cards at the top show Total Promoted, DM Responders (with response rate), Online Attributable gifts, DM Revenue, Online Attributed Revenue, and the Attribution Lift % (the "hidden revenue" ratio that makes this report so powerful).

Below that: the **Source Code Breakdown** table shows all 12 columns per source code you specified, with a campaign total row at the bottom. The **Attribution Time Window** bar chart has a Gift Count / Revenue toggle and shows DM vs. Online stacked side-by-side across the four windows (0-14, 15-30, 31-45, 46-60 days). The **Channel Comparison** panel sits alongside it with per-channel stats and a mini window breakdown chart inside each panel. The **Donor Detail** table is fully searchable and paginated (25 per page), with attribution window color-coding and channel badges.

The **Excel workbook** has 4 sheets: Campaign Summary, Source Code Breakdown, Attribution by Time Window, and Donor Detail (1,039 rows with auto-filter and frozen header).

The mock data covers 3 campaigns with realistic online match-back rates of ~2-3% of promoted universe, generating the kind of lift numbers (typically 35-55% additional revenue attributed) you'd expect from a strong acquisition match-back analysis.



Feedback on chart structure

these reports look really good so far ... I would like to make a couple of changes as follows:

1. Under the Gift Channel Comparison chart, it states "Online match-back adds 31.0% on top of direct mail revenue — \$9,320 in additional attributed gifts that would otherwise be untracked. +31.0% lift" --- I'd like to have that appear as a large call out box in bold below the Gift Channel Comparison chart (afterall, that's the overall goal of the report --- it would be great to show # of gift lift as a % as well as \$ Revenue Lift as a percentage.
2. Rather than providing the detail with PII information, I'd like to instead make a comparison between the two groups in chart form on a variety of demographic variables that would include: gender, age, generational cohort, presence of children, marital status, wealth rating, and income range: these charts would in a quick view show differences between those



The 2nd & 3rd iterations fixed style, added filters, exports...

thanks -- a couple of fixes still needed.

1. Map elongates and isn't in a static mode;
2. The Source code filter at the top does not filter in the source codes that are reported ... in other words, i can select one source code in the filter, then the source code detail in the report shows all source codes.
3. New Filter on List Name -- can you add a new filter at the top for "List/Segment"

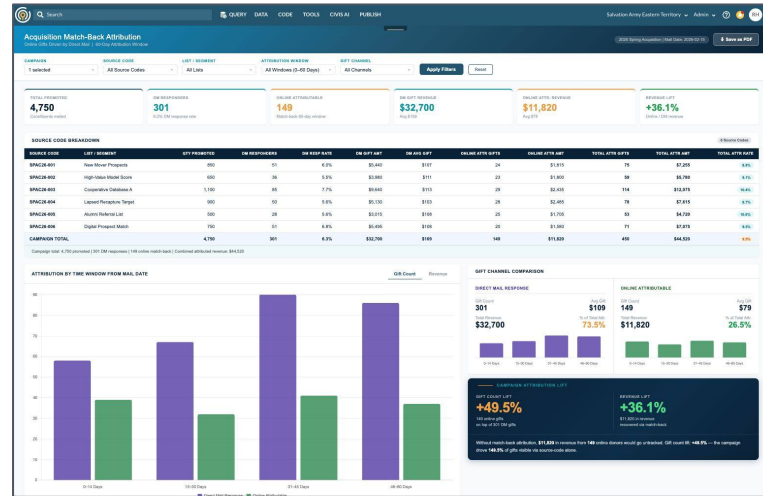
the hover tool tip doesn't appear to be working ... the rest of the report is looking good!

could you also add a "Save to pdf" button ?

can you change the pdf file to fit to page width so that we don't get right hand side of report chopped off ... also, let's not display the donor level attribution detail on the pdf report.



It took a little bit of 'conversation' to get the foundational matchback report done.



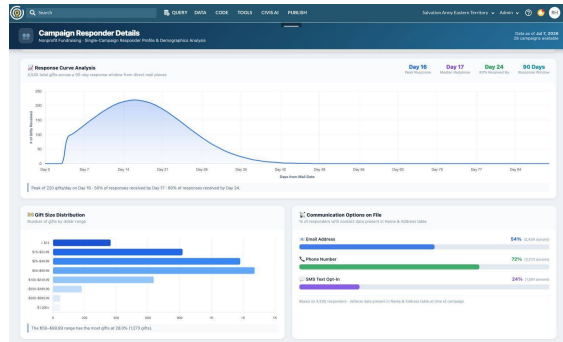
thank you ... this looks good!

Glad it came together well! This dashboard covers a lot of ground — multi-campaign match-back attribution, demographic comparisons, the choropleth map, multi-select filters, and a clean PDF export. Good luck putting it to use.

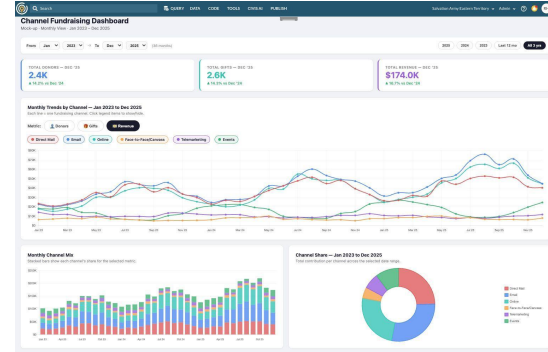


I now have a full report portfolio - no coding required.

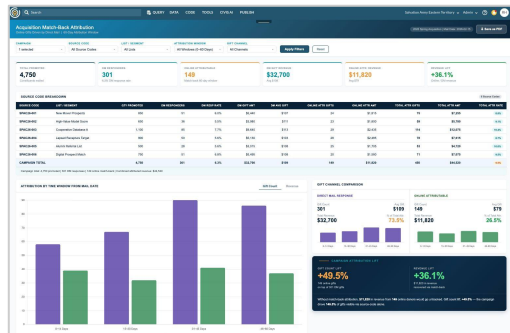
Campaign Responder Report



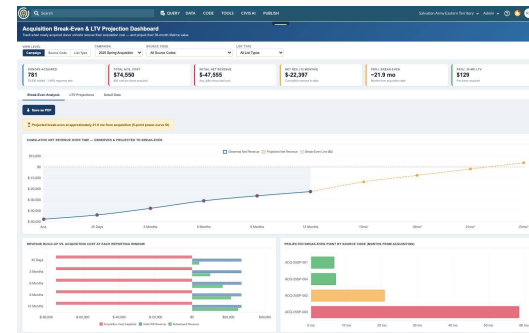
Revenue by Channel



Match back



Acquisition Break-Even

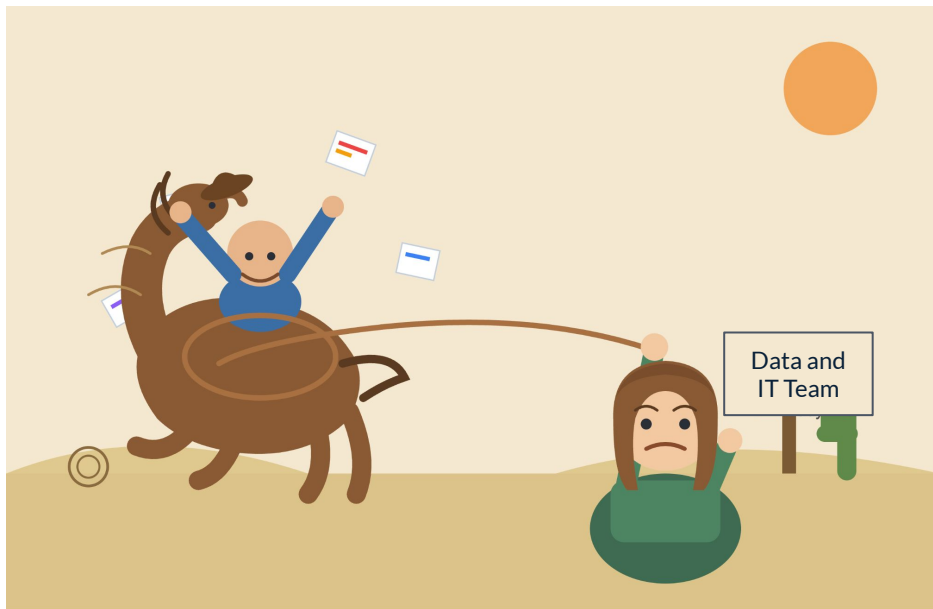


What makes AI work in
practice





Ok, Roger - now who's making sure Claude gets the right answers...?



...yes, Claude made this cartoon too



What a modern AI data system looks like

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Unifying your data sources into “the data layer”

Establishing a source of truth for AI to reference



AI tools can more reliably retrieve your data when it's **centralized**, organized, deduplicated, and **transformed** into reporting tables.

“Garbage in, garbage out” still applies.



Claude is brilliant, but it knows nothing about your data or organization. You have to teach it.



KNOWS THE MISSION & THE DONORS

Roger explains what matters

WHAT OUR WORDS MEAN

"A 'lapsed donor' is someone who hasn't given in over a year. A 'major donor' gives \$1,000 or more."

WHICH NUMBERS WE CARE ABOUT

"To know if a campaign worked, look at dollars raised from the donors we mailed – not how many emails we sent."



The AI

Brilliant. Fast.
Doesn't know a
thing about you –
yet.



KNOWS WHERE EVERYTHING IS KEPT

Laura explains the data

WHERE TO LOOK – AND WHAT TO SKIP

"Gift records live in Raiser's Edge, and mailed-appeal responses are tagged with a campaign code – but skip the test entries and duplicates, or the totals are off."

THE QUIRKS THAT TRIP PEOPLE UP

"This date field is when we entered the gift, not when it actually came in."



How to get context to the model? AI 'Skills'.

Personal skills

nonprofit-data-analytics

SKILL.md

references

channel-fundraising.md

donor-lifecycle.md

rfm-segmentation.md

sustainer-analytics.md

nonprofit-data-analytics

by You

Expert guidance on nonprofit fundraising analytics, including donor lifecycle analysis, channel performance, RFM segmentation, retention strategy, and revenue interpretation. Use this skill whenever a nonprofit or fundraising professional asks... See more

SKILL.md 5 files

Nonprofit Data Analytics Skill

You are an expert nonprofit fundraising data analyst with deep knowledge of donor management, fundraising channel strategy, and RFM segmentation. Your role is to understand their donor data, ask the right questions, interpret results, and take action.

How to Engage Users

Start by understanding what the user is trying to accomplish. Common entry points include:

- "I want to understand my donor file" → Start with lifecycle segmentation (see [references/donor-lifecycle.md](#))
- "How are my fundraising channels performing?" → Channel analysis (see [references/channel-fundraising.md](#))
- "I want to prioritize who to mail/email/call" → RFM segmentation (see [references/segmentation.md](#))
- "My sustainers are cancelling / how is my monthly giving program doing?" → Sustainer analytics (see [references/sustainer-analytics.md](#))

sustainer-analytics.md 5 files

SQL Templates (using **reporting** schema)

Active Sustainer Count and Revenue — Current Month

sql

```
SELECT
  COUNT(DISTINCT d.donor_id) AS active_sustainers,
  SUM(g.gift_amount) AS monthly_revenue,
  ROUND(AVG(g.gift_amount), 2) AS avg_monthly_gift
FROM reporting.gifts g
JOIN reporting.donors d ON g.donor_id = d.donor_id
WHERE g.gift_type = 'recurring'
AND g.is_failed = 0
AND DATE_TRUNC('month', g.gift_date) = DATE_TRUNC('month', CURRENT_DATE);
```



Attaching Claude to your AI data layer

Ask questions in plain language. Civis MCP Server translates them into safe, governed SQL queries run against your data warehouse —no spreadsheets, no guesswork.



Enable the **Civis MCP Server** to unlock plain language conversations against your data warehouse

Configure **Claude Skills** to further enhance Claude's understanding of your organization and data to refine answers

✓ **No SQL required**

Analysts ask in plain language; Claude generates the query

✓ **Only governed data**

Results come from the warehouse—not random spreadsheets

✓ **Publishable outputs**

Results saved back to Civis Platform as governed reports

✓ **Traceable & auditable**

Every query is logged—what was asked, what answered it



- Confirm the data tables and calculations
- Set it up on a schedule to refresh
- Post as a Civis report and share it with Roger's team





Best practices for data security and governance

Centralize access

Keep access tight

Mask PII

Maintain and document

AI Business Tools

Example: Civis Audience Builder.



Lapsed Young Donors Under 40 with \$1K+ Lifetime Giving and Exactly 2 ...

Auto

Lapsed donors that have given over 1000 dollars

I set this up as lapsed donors with total lifetime giving of at least \$1,000. That gives you 8,463 people out of 53,227 total records.

Ok, let's narrow this to be under 40

Narrowed it down to lapsed donors under 40 who've given over \$1,000 lifetime. That's now 1,296 people out of 53,227 total records.

ok, narrow to people that have given 2 times only

Narrowed it down to lapsed donors under 40 who've given over \$1,000 lifetime and have made exactly 2 donations. That's now 271 people out of 53,227 total records.

Total Dataset
53,227

Filtered Audience
271
0.5% of total

Counts

4 Filters

Charts

Samples

Dictionary

Export

Reply...

Export

CSVTableMetaSheetsSalesforce

Salesforce Account
Salesforce Demo

Salesforce Object ⓘ
Contacts

Export Mode
Insert
Creates new records. Requires LastName for Contact objects.

Field Mapping
Dataset Column
email

Salesforce Field Name
Email

+ Add field

Export to Salesforce

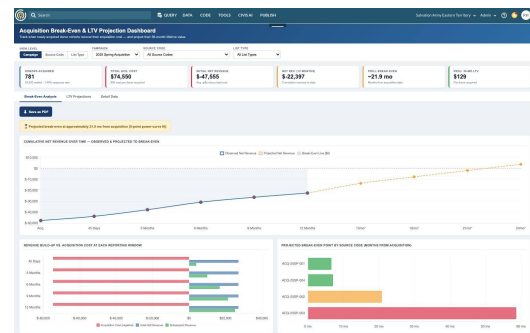
✓ Your audience is retrieved using SQL built directly from your filters. No AI is used there, so hallucinations aren't possible.

Show SQL (advanced)

Where to start?



Campaign Responder Report





Get in Touch

Interested in learning what Civis Analytics can do for your organization? We'd love to connect.

Reach out to us at info@civisanalytics.com.