

# Plan Canada Gets Enterprise-Level Data Analysis with Blackbaud Performance Management

Plan Canada is part of Plan International, a global movement for change, mobilizing millions of people around the world to support social justice for children in developing countries. Plan's agenda is to improve the lives of children. Founded in 1937 as Foster Parents Plan, Plan is one of the world's oldest and largest international development agencies with donors in 17 fundraising countries and programs benefiting children and their families in 49 countries in the developing world. Funds raised in Canada and by Plan worldwide are used to support child-centered, community development projects through sustainable solutions with measurable results.

## THE CHALLENGE

Plan Canada is the second largest of Plan International's national organizations. In fiscal year 2008-2009, Plan Canada processed \$106.5 million in donations, an increase of 12 percent from the previous year. As a child sponsorship organization, Plan Canada deals with a large number of recurring gifts with more than 150,000 donors constituting approximately 190,000 active recurring gifts, which results in over 1.8 million transactions annually.



*Plan works to promote child rights and lift millions of children out of poverty.*

And all of this data goes back 15 years, giving Plan Canada a plethora of data to slice and dice. But too much data can be hard to interpret and understand. Running weekly reports on a data set that continuously grows was becoming time consuming and cumbersome for the organization. Also, Plan's previous solution for data analysis did not have the ability to compare various reports to similar reports from a different time-frame or channel, making it difficult to identify successes and failures.

## THE SOLUTION

The organization needed a way to effectively analyze all the data it gathers so that staff members can get a better understanding of the organization's success. It needed a solution to



## Customer Summary

- Plan Canada has approximately one million constituent records, and in its fiscal year 2008-2009, it processed \$106.5 million in donations. This means that the organization has an immense amount of data to manage and analyze.
- Plan Canada needed a solution to aggregate its vast amount of data, deliver it in a digestible format, and do it in real-time. The organization chose Blackbaud Performance Management to achieve this.
- Blackbaud Performance Management enables Plan Canada to perform robust data analysis on valuable information it needs, including the lifetime value of a donor, retention rates, and organizational performance.

## Blackbaud software and services used by Plan Canada:

- The Raiser's Edge®
- Blackbaud Performance Management™
- Blackbaud® NetCommunity™
- Blackbaud Direct Marketing™
- Target Analytics™
  - ProspectPoint®

aggregate all this data, deliver it in an easy-to-understand format, and do it in real-time.

Plan Canada selected **Blackbaud Performance Management™** to do just that. With Blackbaud Performance Management, the organization has a platform that develops analytical reports including scorecards, dashboards, product vs. team revenue, child assignment and inventory track, and donor statements. With the high-level view of the organization's performance now easily accessible, Plan Canada is able to save time and money with usable information that leads to better decisions.

Additionally, Blackbaud Performance Management enabled Plan Canada to better analyze its donor giving patterns to determine donors who give repeatedly over long periods of time vs. donors who give large gifts but less frequently. Blackbaud Performance Management also helps Plan Canada in long-term planning and specific goal planning/tracking.

“Because Blackbaud Performance Management is based on Microsoft SQL Server, we didn't have to buy additional solutions to get the information we want and need,” said Mark Banbury, vice president and chief information officer for Plan Canada. “Plus, all the data cubes were already defined for us, so we didn't have to go back and create those. Instead, we got a data cube that was 98 percent finished and only required minor adjustments to suit our unique needs. We were able to roll out the entire solution in about a month because of this compared to what would have taken several months with another solutions.”

## THE SOLUTION

Mr. Banbury boasts about the many benefits of Blackbaud Performance Management. He shares the following advantages that Plan Canada has experienced with Blackbaud Performance Management:

- The organization has been able to move weekly reports to daily reports, giving teams across the organization access to the data necessary to make decisions when the decisions need to be made.
- The robust analysis provided by Blackbaud Performance Management enables Plan Canada to look at the value of donors over a lifetime, analyze retention, and determine the top performing channels all with the click of a mouse.
- The solution's integration with SharePoint® gives employees easy access to reports via the organization's Intranet. Employees can drill down further into the data simply by clicking a hyperlink.
- It allows the database team to focus on developing new reports rather than spend time running reports.
- Because it uses Microsoft SQL Server®, users can export reports to Excel®, Word, or even PowerPoint® to include in presentations and other materials.

“Blackbaud Performance Management has revolutionized the way we report on and analyze data. It has transformed the service to our users from reactive report writing and creation to a proactive self-service and on-demand capabilities that really do support effective decision making.”

— Mark Banbury,  
Vice President and Chief  
Information Officer,  
Plan Canada

- The software is easy to maintain and is self sustainable. It plugs into **The Raiser's Edge®**, grabs the data it needs and delivers it to **Blackbaud Performance Management™**.
- The solution has given more insight to Plan's marketing, development, programs, and corporate teams.
- The software allows Plan Canada to slice revenue in different ways. For example, Mr. Banbury can break revenue down by both product and channel to see how much and which team is meeting their objectives.

“Blackbaud Performance Management has revolutionized the way we report on and analyze data,” Mr. Banbury concluded. “It has transformed the service to our users from reactive report writing and creation to a proactive self-service and on-demand capabilities that really do support effective decision making. This has enabled the IT function to add far more value and be more responsive to the needs of the users. Reports are delivered in a variety of ways that include self-service via the web and our intranet, interactively using Excel® and push-style via e-mail. Furthermore, the solution provides several scorecards and dashboards that summarize the performance of various programs and departments that are easy to use and allow drill-down into further detail if required.”

## About Blackbaud

Blackbaud is the leading global provider of software and services designed specifically for nonprofit organizations, enabling them to improve operational efficiency, build strong relationships, and raise more money to support their missions. Approximately 19,000 organizations use one or more of Blackbaud products and services for fundraising, constituent relationship management, financial management, direct marketing, school administration, ticketing, business intelligence, website management, prospect research, consulting, and analytics. Since 1981, Blackbaud's sole focus and expertise has been partnering with nonprofits and providing them the solutions they need to make a difference in their local communities and worldwide. Headquartered in the United States, Blackbaud also has operations in Canada, the United Kingdom, and Australia.

For more information about Blackbaud solutions, contact a Blackbaud account representative. In the United States and Canada, call toll-free 800.443.9441. In Europe, call +44 (0) 141 575 0000. Visit us on the web at [www.blackbaud.com](http://www.blackbaud.com).

Please direct media inquiries to:  
 Melanie Mathos  
 Public Relations Manager  
[melanie.mathos@blackbaud.com](mailto:melanie.mathos@blackbaud.com)  
 800.443.9441 x3307

## Blackbaud®

© November 2009, Blackbaud, Inc.  
 This white paper is for informational purposes only. Blackbaud makes no warranties, expressed or implied, in this summary. The information contained in this document represents the current view of Blackbaud, Inc., on the items discussed as of the date of this publication.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.