



GROW UP / GLOW-UP

A Maturity Model for Advancement Data Governance



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Executive Summary

Fundraising today relies on accurate, timely, and trusted data. Nonprofits depend on donor intelligence, campaign reporting, and stewardship communications to cultivate and retain donors at scale.

Yet behind every dashboard and donor report is a fundamental choice in how data is managed:

- **Output-Oriented Data Management:** reconcile and standardize data at the reporting layer, after it has been entered.
- **Input-Oriented Data Management:** govern and validate data at the point of entry, preventing inconsistencies before they spread.

Many advancement organizations begin in an output-oriented model, but long-term success and scalability depend on moving deliberately toward input-oriented governance.



The Need for Growth Outpaces System Constraints

Most advancement leaders do not experience data problems as a failure of governance. They experience them as an indescribable friction. Reports take longer than they should. Answers to reasonable questions depend on who is asked, or which report is pulled. Dashboards work, but only with explanation. Over time, your organization becomes dependent on a small number of people who know what data is reliable and what is not, and how much adjustment is required before it can be used with confidence.

This is very normal sort of growing pain that emerges when an advancement operation has grown faster than the systems and rules that support it.

At smaller scales, this ambiguity is survivable and leaders can safely kick the can on resolving it. When gift volume is modest, teams are stable, and systems are relatively simple, inconsistencies can be corrected informally. A reporting workaround here, a manual adjustment there. The organization absorbs the cost without noticing it as a cost.

As scale increases, those same workarounds stop being temporary and become unwittingly structural. Cleanup moves even more downstream. Reporting logic grows more complex, building workarounds around workarounds. Institutional knowledge concentrates in fewer hands. The organization remains functional, but increasingly fragile.

This is the inflection point many advancement leaders find themselves at today.

The issue is not whether data governance matters; leaders already know it does. The real question is where governance lives in the system. Is it embedded at the point of entry, or deferred until the moment the data is needed? If you're reading this position paper, it's probably that second one at your organization.



That framing—what orientation are we going to promote for our ongoing needs—determines whether an advancement operation can continue to grow without proportionally increasing risk, cost, and dependency on individual expertise.

The Output-Oriented Model: Fix It Later

In an output-oriented data management model, data quality is addressed primarily at the point of reporting rather than at the point of entry. Information flows into the fundraising CRM with relatively minimal validation, and inconsistencies are resolved downstream through reporting logic, data transformations, or manual intervention. Multiple feeder systems like online giving platforms, athletics systems, and alumni tools often contribute data with differing structures and definitions. To produce usable dashboards for leadership, reporting teams create reconciled or “golden” versions of the data that may not fully exist within the core CRM itself.

Organizations frequently arrive at this model for understandable reasons. Fundraising growth often outpaces the development of formal data governance, particularly during campaigns or periods of rapid expansion. Data entry is decentralized across units, schools, or programs, each operating with slightly different conventions. Legacy systems and long-standing configurations can limit the ability to enforce validation rules at entry. Over time, institutional knowledge about how data should be interpreted or reconciled tends to live in individuals rather than in documented standards or system logic.

For a while, this approach can be effective. Fundraisers can move quickly with minimal friction. Reporting and analytics teams can

The Risks of Remaining Output-Oriented

- **Staff turnover:** reporting rules and coding knowledge often walk out the door with individuals.
- **Tech debt:** quick fixes and downstream scripts create fragile reporting environments.
- **Trust gaps:** CRM shows one reality, dashboards another.
- **Escalating cost:** cleanup needs grow faster than fundraising activity.



compensate for inconsistencies by applying business rules that keep leadership reporting functional and credible.

The output-oriented model also offers flexibility, allowing advancement organizations to absorb new platforms without immediate reengineering of core processes.

However, while the output-oriented model can support short-term momentum, it carries increasing risk as complexity and scale grow, setting the stage for the need to evolve toward more input-oriented governance over time.

The Input-Oriented Model: Get It Right at the Source

In an input-oriented data management model, data quality and consistency are addressed at the moment information enters the system. Data entry is governed through structured workflows that rely on drop-down menus, validation rules, and duplicate detection to enforce standards. Core hierarchies such as funds, appeals, and constituent biographical fields are applied consistently at entry, ensuring that all users are working within the same structural framework. Rather than relying on downstream correction, the system itself becomes the primary mechanism for maintaining data integrity.

Organizations adopt this model when they recognize that long-term success requires alignment across all stakeholder groups. As gift volume and organizational complexity increase, informal or downstream reconciliation processes become increasingly unsustainable. Input-oriented governance enables advancement teams to scale without a corresponding increase in data cleanup effort. It also builds trust across the organization: the data frontline staff see in the CRM is the same data leadership relies on for dashboards, forecasts, and decision-making.

The benefits of this approach compound over time. Because standards are enforced at entry, reporting requires far less transformation and reconciliation. Consistency and accuracy are embedded directly into daily operations rather than layered on afterward. Analysts are freed to focus on insight generation, forecasting, and strategy

rather than data repair. Critically, the organization becomes more resilient to staff turnover, as rules and standards are encoded in systems and processes rather than held in individual expertise.

The input-oriented model is not without its challenges. It requires thoughtful change management and sustained staff engagement, particularly for frontline users who may experience the system as more restrictive. Exceptions—such as complex donor arrangements or unusual gift structures—must be intentionally designed rather than handled ad hoc. Implementation also demands an upfront investment of time and training to define standards, build governance structures, and support adoption. However, for organizations seeking durability, scalability, and institutional confidence in their data, these investments are foundational rather than optional.

Signs of Input-Oriented Maturity

- Reports pull directly from CRM with little adjustment.
- Duplicate records are rare and caught at entry.
- Staff training focuses on why data standards matter, not just how.
- Governance committees oversee data definitions and hierarchies.

A Maturity Model for Advancement Data Governance

We can't think of any organizations that chose their data governance model deliberately at the outset. Who does that?! We grow into a data governance model that works for us at the time. As fundraising ambition, institutional complexity, and technology ecosystems expand, we evolve the way we manage data...sometimes intentionally, usually reactively.

Understanding this progression as a maturity model helps leaders recognize where their organization is today and what the next stage of growth requires.



Stage 1: Output-Oriented (Making It Work)

Most advancement shops begin in an output-oriented state. Data is entered into the CRM through a variety of pathways, often inconsistently, and reconciliation happens later: during reporting, analysis, or stewardship preparation. Business rules are applied downstream, sometimes embedded in reports or spreadsheets, sometimes through tribal knowledge held by a few long-tenured staff members.

At this stage, the organization is focused on momentum. Gifts are coming in, campaigns are moving forward, and the priority is keeping operations running rather than chasing perfection. The output-oriented model works during this stage because volume is manageable and because the cost of fixing data after the fact is still relatively contained. Analysts and advancement services staff act as translators, ensuring leadership receives credible information even when the underlying data requires adjustment.

This stage is not a failure! But it is inherently fragile. As volume increases and systems multiply, the effort required to “make it work” grows unevenly, often concentrated in a small number of roles. Effort becomes expensive, and you start seeing that cost more frequently: in your budget as you adopt more tools to cobble together what you need, but also in staff turnover as they burn out.

Stage 2: Hybrid (You’re Probably Here)

Over time, organizations reach a point where downstream cleanup alone is no longer sufficient. Certain types of errors become too costly, too visible, or too risky to continue correcting after the fact. This is where advancement teams begin to draw distinctions between data that must be right at entry and data that can tolerate more flexibility.

In this transitional, hybrid stage, governance becomes selective. Critical elements (such as legal donor identity, receipting information, and core gift attribution) are governed at the point of entry through validation rules and standardized workflows.



Lower-stakes or more interpretive data, such as event participation, interests, or engagement signals, may still be harmonized downstream for reporting and analysis.

This stage is often where organizations experience their first real returns on governance investment. Staff begin to see that some problems simply cease. Reports become easier to run. Reconciliation effort decreases in targeted areas.

At the same time, tensions emerge: fundraisers may feel the system becoming more structured and resent that downstream work has now moved upstream, and leaders must begin to articulate why certain constraints exist.

The hybrid stage is uncomfortable but productive. It signals an organization actively deciding which kinds of complexity it is willing to carry and which it is not.

Stage 3: Input-Oriented (Designing for Scale)

In a mature, input-oriented model, governance is no longer an overlay. It is embedded directly into CRM workflows and operational processes. Data standards are enforced consistently at entry, and core hierarchies and definitions are shared across the organization. Reporting requires minimal transformation because the data is already structured for use.

At this stage, advancement operations are designed for scale. Growth in gift volume does not require proportional growth in reconciliation effort. You might be able to support hiring an analyst (a report writer, a data visualization expert, or something similar) because your focus is now on generating insight rather than repair. Leadership can rely on dashboards without extensive caveats. Most importantly, the organization becomes more resilient to turnover, to audits, and to future system changes because its data integrity does not depend on individual memory or heroics.

Reaching this stage does not mean eliminating all flexibility or downstream transformation. External platforms will always introduce some variability. But the burden of correction is no longer structural: the system itself carries the rules.

Moving From Recognition to Action

Once you can name where your organization sits on the data governance maturity spectrum, the next question is usually not whether to change, but how to do so without destabilizing operations.

Few advancement organizations have the luxury of pausing fundraising, retooling systems, or re-training staff all at once. Movement toward a more input-oriented model therefore tends to happen incrementally, through a series of deliberate, bounded decisions about where consistency matters most and where flexibility can be preserved.

We do not offer a prescriptive roadmap here, but a set of practical moves that advancement leaders use today to introduce stronger governance without triggering operational backlash or resistance.

Start where errors are most costly. Input-oriented governance gains traction fastest when it is applied first to data elements with clear financial, legal, or reputational consequences. Gift attribution, receipting data, and legal donor identity are rarely controversial places to impose tighter controls, because the downstream risk of getting them wrong is already well understood.

A Maturity Model for Advancement Data Governance

Stage 1: Output-Oriented (Immature)

- Data is entered inconsistently and reconciled later.
- Business rules live in people or spreadsheets.
- Works in the short-term, but fragile.

Stage 2: Hybrid (Transitional)

- Critical data elements governed at input.
- Lower-stakes data harmonized downstream.
- Staff begins to see consistency benefits.

Stage 3: Input-Oriented (Mature)

- Governance embedded in CRM workflows.
- Minimal transformation required for reporting.
- Scales confidently with growth, turnover, and system changes.

Governing these inputs does not require an organization to resolve every ambiguity in its data model; it simply acknowledges that some errors are more expensive than others and deserve earlier intervention.

Tighten governance in phases, not all at once. Organizations that successfully mature their data practices don't attempt to govern everything simultaneously. Instead, they stabilize high-value, high-use data first, allowing lower-stakes data such as events, interests, or old screening data to remain imperfect in the short term.

This phased approach creates visible improvements in reporting and trust without overwhelming staff or systems. Over time, as consistency becomes normalized in core areas, expectations can expand organically rather than by decree.

Invest in people, not just rules. Stronger input controls change how staff experience their work, whether or not leadership intends them to. Validation rules, required fields, and standardized hierarchies introduce friction unless they are paired with training, documentation, and clear rationale.

Organizations that (correctly) treat governance as a systems problem rather than a compliance exercise tend to focus less on enforcement and more on usability; explaining not just what is required, but why those requirements exist and how they reduce rework elsewhere. That's where you want to be: with everyone on the same team working towards a shared goal.

Frame governance as operational maturity, not bureaucracy. How governance is described internally often determines whether it succeeds. Input-oriented can feel like bureaucracy when it's pitched as bureaucracy, but internal branding matters.

When positioned as "more rules," it is usually met with resistance; when framed as a way to reduce manual correction, survive turnover, and scale reporting demands, everyone's priorities come into alignment.

Most everyone can agree that building systems that remain reliable as the organization grows, staff changes, and platforms evolve is a good thing.

Conclusion: Choosing Where Governance Lives

Most advancement organizations begin in an output-oriented data model. That is not a failure of leadership or discipline; it is a natural consequence of growth outpacing infrastructure. For a time, downstream reconciliation, reporting logic, and human expertise can compensate for inconsistent inputs. Many organizations raise substantial funds this way.

But that model does not scale.

As fundraising volume, platforms, and stakeholder demands increase, the cost of fixing data later rises faster than the value created. Reporting becomes fragile. Trust becomes conditional. Institutional knowledge concentrates in a few people rather than in systems. At a certain point, continued growth forces a choice: either governance moves upstream to the point of entry, or the organization accepts escalating risk, rework, and dependency as the price of scale.

Input-oriented governance is not about perfection or control. It is about deciding where consistency must exist for the organization to function sustainably. Organizations that make this shift embed standards into workflows, reduce the distance between operations and reporting, and create data environments that can withstand turnover, audits, and system change. They are not “more bureaucratic.” They are more mature.

Advancement shops that want to scale with confidence must decide whether governance will remain a downstream cleanup function or become a core operational capability. There is no shame in where an organization starts, but leadership is demonstrated by recognizing when it is time to move.

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