apte
Data Intelligence for Independent Schools

Kiptum

Data-Driven or Data-Doomed?

Eight Keys to Unlock Better Fundraising Data

Kaitlin Windle, CEO & Founder at **Apte** and **Mike Smith, Fundraising Consultant and Data Guru** at **Kiptum Consulting** met earlier this year and started discussing the root cause of pain for development reporting which stems from not having clean data foundations.

Today we see development offices under more and more pressure to present Board-ready presentations with advanced analytics, using data and donor analytics to drive strategy. There are ways to make this data easy to analyze and understand, and, conversely, there are ways to set up data that makes this inherently much more difficult.

Want to make your life easier and make your data work for you? We decided to write a playbook on the common pitfalls that we see which may ruin your fundraising data, so you can avoid them as you set your fundraising strategies.

This is *not* a step-by-step tutorial on how to use a Donor CRM, but rather a point of inspiration. Read on to see how one might lay a great foundation for data that will allow it to do more for you.

Clean data is the foundation of great analytics and great analytics is the foundation to executing a successful strategy to raise more money!

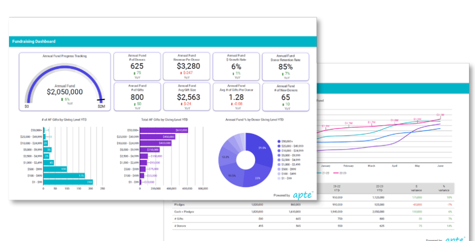
Before

Development Report
as of February 28, 2025

Gifts	FY 22 YTD	FY 23 YTD	FY 24 YTD	FY 25 YTD
Annual Fund Gifts	$5,032,585	$5,404,147	$5,518,643	$5,737,214
Special Gifts	$1,258,165	$1,196,356	$343,054	$583,227
Auction	$133,820	$180,895	$56,370	$277,720
Capital Campaign	$102,706	$16,910,794	$8,008,415	$1,118,028
Endowment	$1,513,008	$359,023	$97,551	$385,801
Total	$8,040,284	$24,051,215	$14,024,033	$8,101,990

Donors	FY 22 YTD	FY 23 YTD	FY 24 YTD	FY 25 YTD
Annual Fund Donors	1,456	1,450	1,503	1,539
Trustees	33	32	35	35
Parents	330	326	320	374
Alumnae	728	741	727	736
Others	365	351	421	394

After



Picture Yourself

It's the middle of winter, and as part of your school's Board of Trustees meeting in January, the Head of School has asked you to prepare an update on the school's progress towards its annual fundraising goal. You can hardly believe that it was only two years ago you were first asked to give such an update; you can remember your **heart palpitations** from the first such request just as well as the long hours you put in to meet it. The disappointment in the faces around the table after the third time you answered a question with, "I'm not sure, I'll have to get back to you," left you frustrated and even **fearing for your job a bit**. But since taking this job, in which you inherited a highly disorganized donor database and a whole new team to manage it, you have gotten your team's fundraising data in a place where these updates give you a fraction of the stress they did two years ago, and they take a fraction of the time to prepare.

With clean data and the right analytical tools, you walk into the meeting ready to talk about everything from the percentage of families that have made a gift *per grade level* to overall donor retention to progress you've made in reactivating former donors. One Board member recalls that last year the school resolved to make plans for greater outreach to alumni, and out of curiosity wonders if there has been a noticeable uptick in alumni giving as a result. This isn't in the slides you prepared, but you're able to respond within a few minutes–with data that's even broken down by alumni class year. You finish your presentation by outlining the plan to reach the overall fundraising goal by May, a plan that simply wasn't possible to execute two years ago because the data wouldn't allow it. **Now, you're able to approach the rest of the year's fundraising more strategically**, with a plan that includes:

- An email campaign sent only to current parents who haven't yet given, with sequenced messages that each link to a live dashboard showing each grade level's family participation percentage

- A mailer to non-parent donors asking for customized gift amounts based on their previous giving levels

- Meetings set up between the Head of School and parents of students who are new to the school and who haven't yet made a large gift despite showing high giving capacity

- A phone-a-thon with your fundraising committee in which each member is armed with an easy-to-read profile of every constituent on their call list that fits on a single screen and includes past giving data, a suggested donation level, personal information to refer to, and notes from previous fundraising efforts

At one point, some aspects of this plan would have taken *weeks* to prepare. But with your clean, organized database, these campaigns can be pulled together in a matter of days, if not hours. Furthermore, **your data now has the power to tell you what to do and what *not* to do.** By tracking the performance of last year's fundraising emails by each donor segment, you know that another such campaign is what you need to get to 100% parent participation in the annual fund. You also know that one version of the mailer you sent to grandparents last year wasn't worth the time and cost, so you've scrapped it for a version that the data clearly shows led to both a greater number of donations and more money raised.

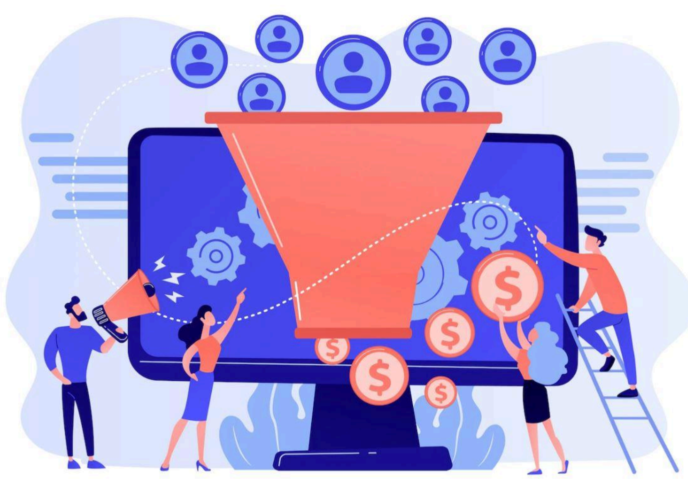
Picture your development office where:

1. **Data** is perfectly aligned with real-life fundraising.

2. **Staff Can Trust the Data** and can generate meaningful reports in minutes, unlocking deeper insights into donor behavior and philanthropic trends.

3. **Board & Leadership** teams receive accurate fundraising dashboards and can confidently make decisions about resource allocation and strategic direction.

This *isn't* an unattainable dream. With disciplined data management and regular upkeep, your donor database can become a powerful driver of fundraising growth.



Why Clean Data Matters

- **Efficiency**: Less time spent fixing records and cleaning up reports.
- **Accuracy**: Correct codes and contact details ensure appeals reach the right constituents.
- **Credibility**: Your Board, head of school, and leadership teams rely on transparent reporting.
    - Inaccurate data diminishes trust and impacts decision-making.

- **Opportunity**: Granular segmentation (made possible by well-managed data) reveals new fundraising opportunities, major gift prospects, and more.

The Top 8 Data Pitfalls

1. Messy Data Tables

Clean data tables with clean naming conventions can solve just about any data and analytical challenge, which is why this is the first (and longest!) item on the list.

Get–and Keep–Your Database Clean

Clean data is not a one-off project; it's an **ongoing commitment**. Regular reviews and established protocols keep records accurate and up-to-date.

- **Manageable Number of Constituent Codes**: Avoid overwhelming your team with an explosion of codes that rarely see use. Streamline to the essentials.
- **Consistent Naming Conventions**: Use a single, recognized naming structure for data tables, campaigns, funds, and appeals.
    - Stick to it across all entries—no exceptions. For example, you might use the format:
        - `Campaign_<SchoolYearRange>` (e.g., `Campaign_2024_2025`)
        - `Fund_<Purpose>_<Year>` (e.g., `Fund_Scholarship_2024`)

Disorganized Tables = a Wobbly Foundation

Data tables are the building blocks of a healthy CRM. The more organized your tables, the easier it is to run sophisticated queries and produce insightful reports.

- **Clear Terminology**: Use descriptive names for data tables (e.g., "Spring Gala 2025" vs. "SG25").
- **Access Control**: Grant editing privileges carefully. Fewer editors mean fewer accidental errors or duplications.

Why Data Tables Matter

Data tables are the structural underpinnings of your CRM and any related fundraising systems. Think of them as the **"blueprints"** that tell you where information lives and how it's organized.

When data tables are well-maintained, reports flow seamlessly, insights are accurate, and everyone on your team works from the same source of truth. But when data tables get sloppy—due to inconsistent naming, duplicate records, or ad hoc changes—your entire reporting and analytics process suffers.

The Cost of Inconsistency

- **Duplicate or Conflicting Records**: If you have three different entries for "Annual Fund" (e.g., "Annual Fund 24-25," "Annual Fund 2024-2025," and just "Annual Fund"), it's easy to accidentally segment donors incorrectly or double-count gifts. It's also difficult to monitor fundraising progress.
- **Wasted Time**: Staff spend hours reconciling which table is correct instead of focusing on strategy and donor relationships.
- **Reporting Headaches**: Leadership and board reports become less trustworthy when underlying data is messy or misaligned.

DO NOT DO THIS!	DO THIS INSTEAD
Annual Fund 2025	Annual Fund 2025
AF 2024	Annual Fund 2024
2023 Annual	Annual Fund 2023
2022 AF	Annual Fund 2022
2021AF	Annual Fund 2021
Annual 2021	

- ✗ This is guaranteed chaos
- ✗ Your funds will show up in different alphabetical order
- ✗ You might not be able to find them in your data tables easily
- ✗ You might not even know you have two 2021 Annual Funds and omit one by accident

- ✓ One year, one fund
- ✓ Guaranteed to show up together alphabetically in a table so you don't miss any

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Key Principles for Clean Data Tables

1. **Consistent Naming Conventions**

    - Agree on a naming format for each type of table (Campaigns, Funds, Appeals, etc.).
    - Make sure these conventions are documented and accessible to anyone who touches the data.
2. **One Record per Campaign/Fund/Appeal**
    - Avoid creating multiple entries for what is essentially the *same* thing.
    - If you need a variation (e.g., same Annual Fund but targeting different subsets of donors), consider using sub-appeals or attributes instead.
3. **Versioning & Archiving**
    - When a campaign or fund ends, don't overwrite it—close it out, archive it, and start a new table or entry for the next year.
    - This preserves historical context while preventing mix-ups (like continuing to add gifts to last year's campaign).
4. **Documentation & Training**
    - Provide team members with clear guidelines:
        - How to name a new campaign or fund table
        - What each field in the table means
        - Who has permission to create, edit, or retire these tables
    - Periodically train or refresh your staff to ensure ongoing compliance.

Three Examples: From Clean to Chaotic

Below are three scenarios illustrating how an "Annual Fund" might be named in your data tables, highlighting the impact on clarity and reporting. While these examples focus on campaigns, the same principles apply to funds, appeals, or any other data table in your CRM.

Scenario	Table Name	Pros / Cons
Squeaky Clean	Annual Fund	✓ Only one option and then reports run with a date filter eliminates all option for erroneous entry and incorrect analysis
Middle of the Road	Annual Fund 2025 Annual Fund	× Labeling your Annual Fund campaign by different years works if you take prior year pledges before the start of your fiscal year but you will need to be very clear on if you are running things by date range or campaign, we see a lot of gifts and inaccurate totals with this method × Also having a blanket Annual Fund could cause some gifts to be entered here and not included in reports filtered just on the Annual Fund Year × If you do use a year, it needs to be on all gifts and there should be no "Annual Fund" without a year gifts
Chaotic	Annual Fund 2025 AF25 25Annual Annual	× Complete chaos – and yes, we do see this happen! × If your tables look like this, you need a deep clean! × You will likely be running reports with incorrect and inconsistent amounts

In the **Squeaky-Clean** example, you see a single consistent label: "Annual Fund". The underscores, while not mandatory, can ensure compatibility with various systems and make searching easier. This will also create fewer options to search for when creating a report.

In the **Chaotic** scenario, three or more "Annual Fund" campaign names exist simultaneously. One staffer might post a gift to "Annual Fund 2025," another to "AF25," while a new staff member just picks "Annual." Now your data is split between different tables, and it's difficult to run a single report to see total giving to the annual fund that year.

Why Naming Conventions Are So Important

1. **Searchability**
    - In many CRMs, a single letter difference can cause confusion. A uniform naming pattern (e.g., `Annual Fund`) ensures you always know what to type or click.
2. **Historical Context**
    - You may want to compare the 2024–25 Annual Fund to previous years. If last year is called "Ann. Fund '23-24" and the year before that is "AnnualFund2022-23," your reporting merges become messy. A consistent sequence (`Annual Fund 2023`, `Annual Fund 2024`, etc.) keeps it clean.

    - However, we would argue that the **CLEANEST** way to do this is to run your Annual Fund on date ranges. If you do add years to your Table name, you will have to be clear on which data and dates is included where and on keeping those naming conventions clean. This method results in only ONE "Annual Fund" and never gets messy.
3. **Automation & Integrations**
    - If you sync your CRM with finance software, email marketing tools, or an online giving platform, consistent naming ensures data flows correctly without manual matching or duplication.
4. **Staff Turnover & Training**
    - Advancement offices often face staff changes. With well-documented naming rules, new team members quickly understand how to create or locate the correct data tables.

Practical Tips for Maintaining Clean Data Tables

- **Create a "Master List"**: Keep an Excel spreadsheet or internal Google Sheet page listing all active campaign, fund, and appeal names. Note their open/close dates and the staff owners.

- **Restrict Table Creation**: Limit who can create new data tables. If any staff member can add a new one at will, you'll quickly end up with inconsistencies.

- **End-of-Year (EOY) Review**: As part of your annual BOY/EOY checklist, retire or archive expired campaigns and ensure new ones follow your naming conventions.

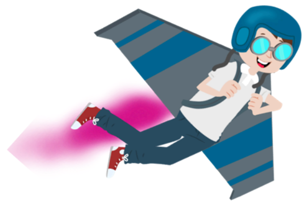
- **Run "Naming Conventions" Reports**: If your CRM allows it, periodically generate a list of all campaign or fund names to spot duplicates or anomalies.

- **Use CRM Features**: Many systems have built-in validations or drop-down lists to enforce naming consistency. Explore these to reduce user error.

Final Thoughts

When your data tables are neat, well-structured, and consistently named, your entire fundraising operation benefits. Reports become more accurate, staff work more efficiently, and you have a clear picture of how each campaign, fund, and appeal is performing. By contrast, a messy or inconsistent data-table environment can lead to duplicate records, confused donors, and lost revenue opportunities.

Takeaway: Data tables are the bedrock of your CRM—if they're sound and consistent, everything else (from data entry to high-level analytics) becomes far more reliable and insightful.



2. Constituent Code Chaos

Building on the foundation of understanding clean data tables, constituent codes follow the same logic.

Constituent codes identify each individual's relationship to the school—current parent, alumni, grandparent, board member, etc. By using **start** and **end dates** instead of deleting codes outright, you preserve historical accuracy and can more easily perform comparative analyses of your constituent groups over time.

A good example of this is with parents of graduating students. By keeping the "Current Parent" code with the appropriate end date and adding an "Alumni Parent" code, we ensure that a parent's past giving data is still tied to the "Current Parent" code.

Otherwise, if we wanted to see how this year's parents' donations stacked up to previous year's parents, we wouldn't have any easy way to include those parents for whom we would have deleted the "Current Parent" code. Instead, all of their past donations would now only be categorized under "Alumni Parent" giving.

Constituent Code	Start Date	End Date	Usage Notes
Current Parent	7/1/YYYY	Blank / 6/30/YYYY	✓ Keeping all start dates as 7/1 and end dates as 6/30 will create much cleaner queries ✓ Current Parent End Date IS <blank> will give you all current parents
Trustee	7/1/YYYY	Blank / 6/30/YYYY	✓ Trustee End Date IS <blank> will give you all current trustees ✓ Trustee End Date IS <not blank> will give you all former trustees and the years they served
Alumni	7/1/YYYY (graduation date)	Blank (unless inactive or deceased)	✓ Keeping all alumni dates to 7/1/YYYY will keep queries squeaky clean ✓ Alumni End Date IS <blank> will give you all current alumni
Past Parent	7/1/YYYY (graduation / withdraw date)	Blank (unless inactive or deceased)	✓ Past Parent End Date IS <blank> will give you all past parents

Assign Codes Consistently: Ensure every individual in the database has at least one constituent code.

- **Maintain Accuracy**: Update or end-date codes at least once a year (e.g., after each graduation cycle).
- **Don't Delete**: **End-dating preserves historical context** (e.g., a donor who was once an alumnus, then a parent).
- **Have a hierarchy:** Make sure you decide on a hierarchy and keep their constituent code records clean so that if they give, the gift gets assigned the constituency that is associated with their primary constituency code which will give you clean reports for giving by constituency type.

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3. Misunderstanding and Misusing Campaigns, Funds, and Appeals

Campaigns

An overarching fundraising effort, such as an Annual Fund or Capital Campaign.

- **Naming Conventions**: Include the focus area (e.g., "Annual Fund" "Raising the Bar").
- **Reporting**: Each gift to a campaign should be linked to the correct record for accurate totals.

Funds

A specific purpose or budget line within a campaign (e.g., Scholarship Fund, Technology Fund).

- **Restrictions**: Some are restricted, some are unrestricted; track them carefully to avoid compliance issues.
- **Avoid Fragmentation**: Too many fund codes dilute your reporting. Consolidate where possible.

Appeals

The specific "ask" or communication that prompted the gift (e.g., "Spring Direct Mail," "Holiday Email Campaign").

- **Multi-Channel**: Decide how to differentiate appeals for email, social media, direct mail, etc.
- **ROI Analysis**: Tracking appeals in your CRM helps you evaluate which channels are most effective.

Here are some examples of how to structure Campaigns, Funds and Appeals

Campaign	Fund	Appeal
Raising the Bar	Endowment	Personal Solicitation
Raising the Bar	Building	Trustee Appeal
Raising the Bar	Annual Fund	Fall Mailing 24-25

Campaign	Fund	Appeal
Annual 24-25	Annual Fund	Giving Day 24-25

Campaign	Fund	Appeal
Spring Gala	Scholarship	Paddle Raise
Spring Gala	Annual Fund	Tickets

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4. Failing to Track Giving by Household

Household Giving / Soft Credits

- **Define Household**: Typically, spouses/partners who co-manage finances or philanthropic decisions.
- **Assign Soft Credits**: Ensure both individuals receive recognition for a joint gift, while the "hard credit" is to the primary donor.
- **Consistent Linking**: Set your CRM to reflect household relationships consistently for accurate reporting.

Donor-Advised Funds (DAFs)

- **Gift Source**: Gifts may come from the financial institution managing the fund.
- **Soft vs. Hard Credits**: Decide how to assign donor recognition while accurately crediting the DAF source.
- **Tax Receipt Language**: DAF gifts require specific acknowledgments; ensure your CRM can accommodate these.

What this means

With some families, both spouses make gifts individually in addition to giving through a donor-advised fund (DAF) and possible additional soft credits from other friends and family. In these cases, it can be tricky to keep track of how much giving has come from a *household*.

Why it matters

Some CRMs make it tricky to track giving by household. Without understanding household giving, you cannot accurately report on things like the percentage of current families that have given, or the total amount given by household, which may be necessary for targeted fundraising appeals to families who haven't yet given at all or for accurately crediting families for their donations in your annual report.

How to approach

Gifts that technically come from a Donor-Advised Fund (DAF) often cause unnecessary confusion around who or what gets credited for making the donation and how.

Many fundraisers enter their donor's DAFs as a separate constituent–which isn't a problem, but may *create* a problem if gifts from that DAF are not also credited to the donor(s) behind it. In fact, it might not be necessary to add a DAF to your database as a separate constituent at all for two reasons:

1) You will never need to solicit a DAF directly for donations, and

2) It is far more imperative for you to track donations that came from an individual as opposed to tracking gifts from their DAF separately.

That said, it can be important for some reporting–particularly the annual DASL report that your school may participate in–to track giving from DAFs.

To do this without creating a separate constituent record for a DAF, you can hard credit the gift to the individual donor then add a note, comment, gift subtype or attribute to the gift record that simply indicates it came from a DAF. Any of these can be included in a query that would produce a list of all gifts made from DAFs. If you do wish to create separate constituent records for DAFs, be sure to soft credit the donor(s) behind them for any gifts.

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5. Making a Mess With Attributes

Attributes (or custom fields) capture important details like "Alumni Class Year," "Volunteering Interests," or "Preferred Contact Method."

- **Set Clear Standards**: Decide which attributes truly drive your analyses or segmentation.
- **Limit Overuse**: Too many custom fields can cause confusion; only track attributes you genuinely need.
- **Regular Audits**: Deactivate unused attributes and maintain consistency (e.g., standardized naming).

What this means

Attributes are great for tracking data on your constituents that don't fit in existing categories or fields in Raiser's Edge *and* that you want to be categorizable under something more specific than general "notes".

For example, a constituent might have special instructions for outreach beyond "do not mail" or "do not call", both of which are existing fields in RE. You might also use a separate wealth analysis tool, and an attribute with a title like "WealthTool Score" would be a good place to import and collect that data.

Clean data table rules apply here to make attributes useful!

Why this matters

There is a risk of making your data unnecessarily messy and complicated if you use attributes for data points that have existing fields like graduating class year or data that can be derived from a simple query like giving levels.

Attributes should also not be used to store data that is subject to change, again, like giving levels. For example, say you created an attribute called “Giving Level”, and a donor’s total giving one year added up to what you defined as “Silver Level”. The following year, they gave far beyond that. Now, you have to manually update a data point that a) could affect your understanding of their giving history and b) you could have derived from a simple query of total giving for the year.

How to approach

Start with the questions you want to be able to answer quickly and what ways it would be helpful for you to segment your constituent population. For example, existing fields allow you to quickly answer questions you have about giving by different constituent codes.

- Would it be helpful for you to know about giving by xxx?
- Would you be able to create a more effective appeal for gifts if you could target constituents who were all members of a local community group?

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6. Starting the Year Unprepared

An effective CRM strategy includes two major “checkpoints” each year: **Beginning of Year (BOY)** and **End of Year (EOY)**. Use these times to conduct a thorough data audit, which should include the following tasks:

1. **Constituent Code Review**
    - End-date codes for parents of newly graduated students.
    - Assign “Current Parent” codes to families of new students.
2. **Attribute Clean-Up**
    - Merge or remove redundant attributes.
    - Ensure naming conventions are consistent.
3. **Campaign & Fund Close-Out**
    - Finish the prior year’s campaigns with final reports.
    - Archive or rename old campaigns, funds, or appeals.
4. **Household/DAF Verification**
    - Confirm soft credit assignments are correct.
    - Update any addresses or constituent relationships that changed.

5. **Staff Training**
    - Provide refreshers on data entry protocols.
    - Introduce new features or updated procedures.
6. **Reporting & Analytics**
    - Generate summary reports for leadership (e.g., top donors, major giving trends).
    - Use insights to shape upcoming fundraising strategies.

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7. Leaving Manual Entry to the Whims of the Enterer

When it comes to manual entry of new database records, be they gifts, constituents, or fundraising moves, adherence to data entry standards is critical. Some of the same principles around naming conventions that we discussed in the previous section on data tables certainly apply here, but process standards are equally important when it comes to manual data entry. This is not a problem that is limited to larger schools that may have several different people entering data; a single staff member responsible for data entry can easily cause a lot of headaches if they do not stick to the standards!

- **Required Fields**: To ensure that every record is entered completely, be thoughtful about what fields you require for any new record in your CRM. Some common required fields for new gift records include full name, address, email, constituent code, and gift details (date, amount, campaign/fund/appeal).
- **Record Duplication Check**: Train staff to search for existing constituents before creating a new one.
- **Consistent Gift Entry**: If a gift is tied to multiple constituents (e.g., spouses), determine how your system should record these with special attention given to how soft credits and attributes are entered.
- **Accuracy Over Speed**: Encourage staff to spend a moment verifying codes and attributes. Proper entry today saves hours of cleanup tomorrow.

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8. Missing Opportunities with Online Forms

Most fundraising CRMs include a native platform for creating online forms for donation intake. Rather than thinking of these as simply vehicles through which your school can collect cash and pledges, think of them as another point of valuable data entry. Many schools build a single form, add it to the fundraising page on the school website, and call it a day. Schools with more sophisticated fundraising operations understand that, for example, you can use multiple online forms to track the performance of different fundraising appeals–even enabling the collection of data for A/B testing of different language or messages in a single email campaign.

- **Required Fields**: At a basic level, ensure that your online form is collecting the data that is most essential, such as full name, address, email, and phone number, and that your forms are linked to the proper campaign, fund, and appeal.
- **Separate Forms for Separate Appeals**: To track performance of individual appeals more accurately, ensure that donations are linked to the appeal that generated them by creating an online donor form for each. This opens the door for powerful analysis that can reveal, for example, what messages encourage greater giving from email campaigns and even where QR codes should be positioned at events.

Putting It All Together: Data Discipline Fuels Strategy

Clean, consistently managed data is the engine that powers:

- **Advanced Analytics**: Easily run reports on donor retention, major gifts, and appeal performance.
- **Stronger Donor Relationships**: Personalized communication depends on knowing donors' histories, preferences, and affiliations.
- **Institutional Credibility**: Confident data leads to clear, trustworthy reports to boards and accreditation bodies.

Your Next Steps

1. **Assess Your Current CRM Practices**
    - Where do you see redundant codes, outdated attributes, or messy naming conventions?
2. **Prioritize Data Hygiene**
    - Identify which changes will yield the biggest impact quickly (e.g., updating constituent codes for all new families).
3. **Seek Professional Guidance**
    - If this feels overwhelming, remember ***you're not alone.*** Many schools partner with experts to streamline data protocols and clean up messy databases.
4. **Commit to Ongoing Review**
    - Data discipline is an annual (or even quarterly) habit, not a one-time project.

Need Extra Help?
Kiptum specializes in helping independent schools build robust data foundations that fuel growth and Apte specializes in analyzing your data and creating board ready reports.

Please reach out to kaitlin@apte.io or mike@kiptumconsulting.com to set up a time to chat to see how we can help tailor these best practices to your unique needs.

Kaitlin Windle, Founder, Apte

As a proud alum of Hathaway Brown School for girls, Kaitlin is particularly passionate about independent school data intelligence.

With a background of being a professional ballerina to working in investment banking and private equity on Wall Street with JPMorgan and Pantheon, Kaitlin then entered the nonprofit sector as a Development Director and then CFO.

Leveraging her investment banking skills for analyzing data, she started by manually standardizing board reports and delighting executive teams and board members with newfound analytics and reports.

Using these reports, she was able to help drive organizations to their most successful fundraising and financial performance in under a year. Seeing the difference that can be made in such a short time by using data to drive strategic decision making inspired her to start Apte to empower other organizations and independent schools.

Mike Smith, Founder & Lead Consultant, Kiptum Consulting

Mike Smith has spent over 20 years in the field of K-12 education with the bulk of the last decade as a consultant for school and district leadership on a variety of subjects. His experience in research and data analysis introduced him to the world of fundraising for independent schools, in which he gradually developed his expertise and the services he offers in that area. Prior to his work as a consultant, Mike worked as a senior data analyst in the Chicago Public Schools supporting a region of elementary schools and guiding their leadership in responsible use of data and data-driven instructional practices.

Mike also spent six years as a Strategy Officer with Modern Teacher, consulting with superintendents and their cabinets in nearly 30 districts around the country as they designed and implemented multi-year strategic plans to spread innovative, learner-centered instructional models to all of their classrooms. To help execute those plans, Mike engaged with all levels of his client districts, training cohorts of teachers in learner-centered strategies, coaching school leaders on effective classroom observation practices, and holding regular full-day planning sessions with leadership cabinets.

Mike has not only trained over a thousand teachers on learner-centered practices, he also trained hundreds of district and school leaders on effective classroom observation and is an expert in Elmore, City, et al's Instructional Rounds process. In one three-year engagement, Mike trained every principal and assistant principal in nine Delaware school districts–over 250 school leaders in total–over five full-day sessions. Mike is an avid runner and officially incorporated as Kiptum Consulting LLC in October of 2023 in honor of Kelvin Kiptum's world record-breaking finish in the Chicago Marathon that year. He and his wife live just outside of Chicago with their five-year-old daughter and a bunch of other creatures, including their mastiff, cat, chickens, and parakeets.