

Past, Present, and Future: The Story of Your Data and Where it Can Take You

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The Story of Your Data

*As fundraising becomes more diverse and more complex, you need to **go beyond your campaign results** and take a deeper look into your donors' behaviors and trends.*

Arm yourself with actionable information

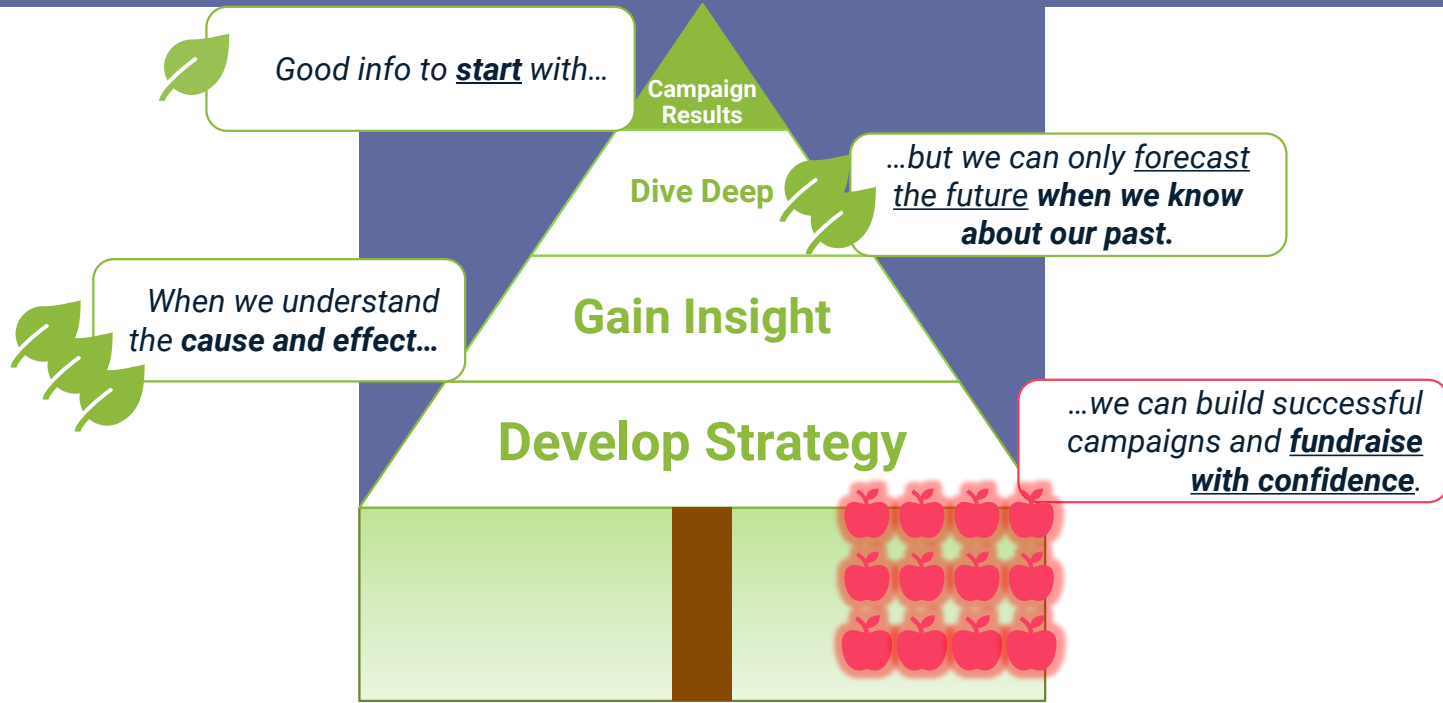
like understanding how your donors choose to give, sustainer conversion rates, the impact of your growing sustainer file, retention rates, and changes in average gift amounts. These are just a few examples of the information

you can use to drive strategy for your entire program.





Knowing a little about a lot only gets you so far





Start with...

...what is currently happening:



You are here

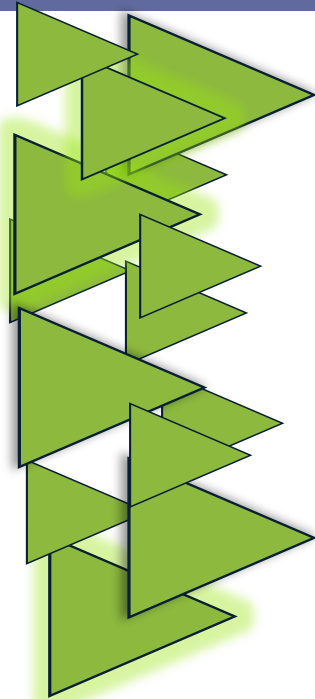
- How are campaigns performing? What are the results?
- Any changes to segment performance from previous campaigns?
- How is your donor file changing? Are sustainers increasing?
- What giving channels are donors using?



See the forest for the trees...



You are here



...by answering these questions:

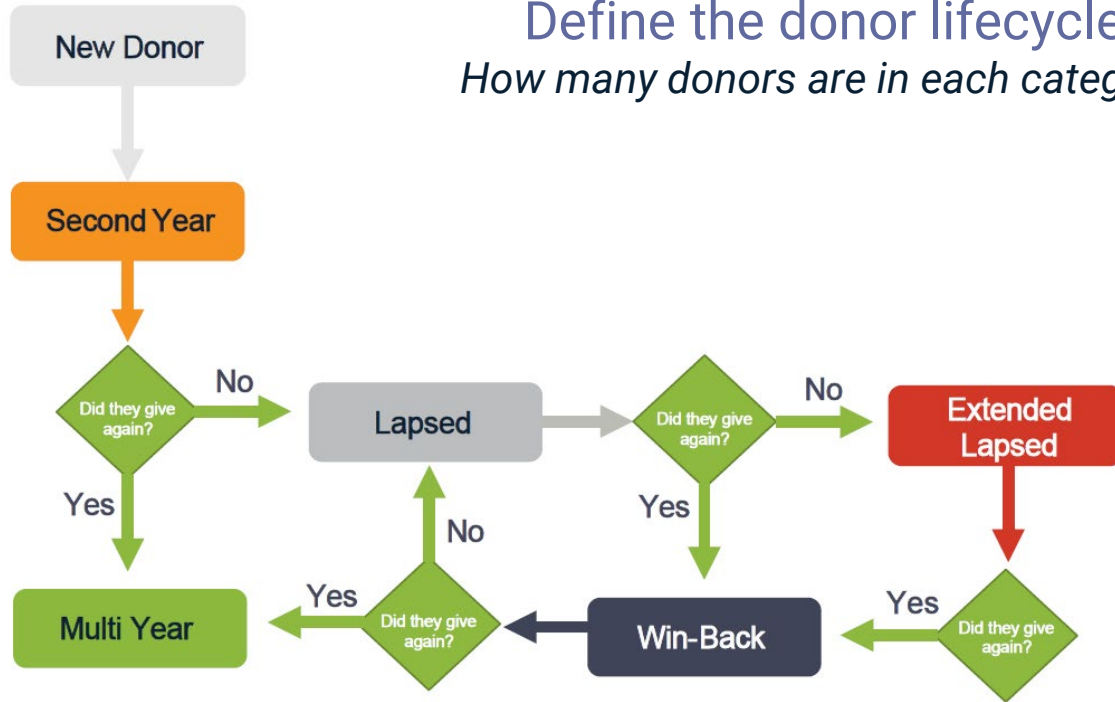
- What have we done well? How has that affected our present?
- What has challenged us? How did we respond?
- How do our donors behave?
- What else does our file tell us?

Dive Deep to Gain Insight



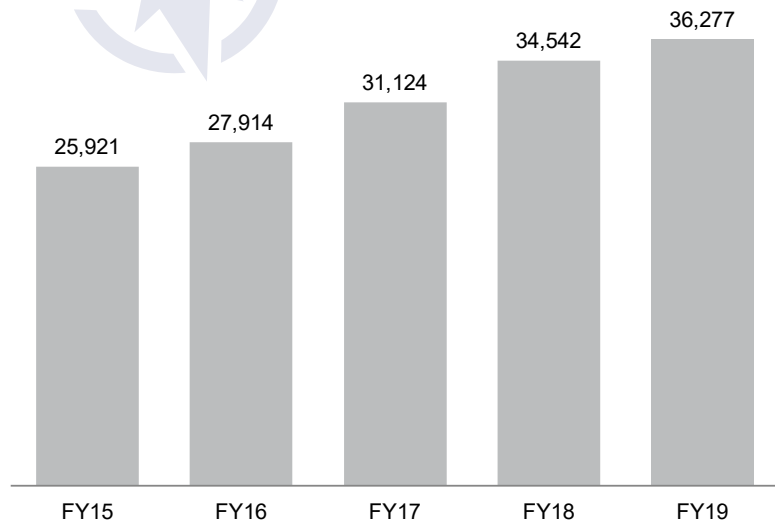
About your donors

Define the donor lifecycle.
How many donors are in each category?



How many donors

Active Donors



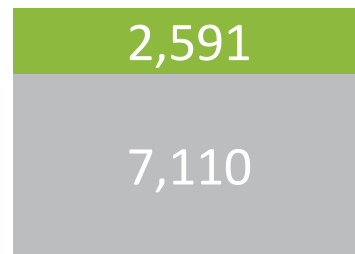
5.0%

The number of donors is up!

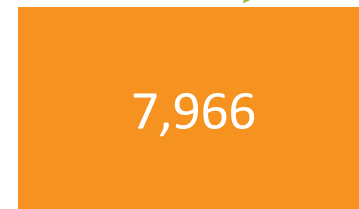
Good news...

...and opportunity awaits!

Donor Gained



Donors Lost



■ New

■ Reactivated

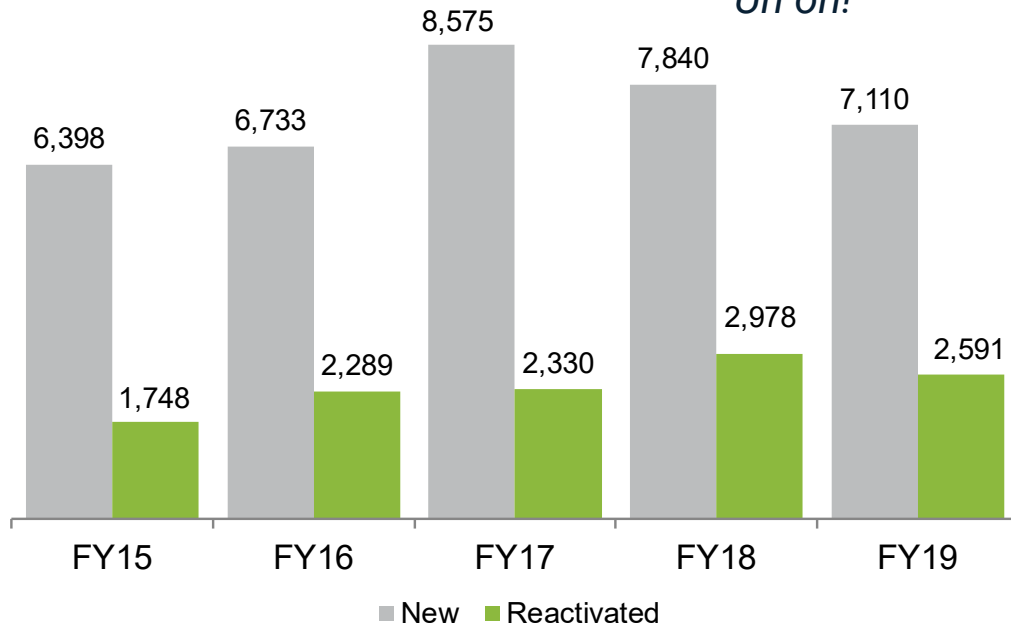
■ Lapsed

How many donors

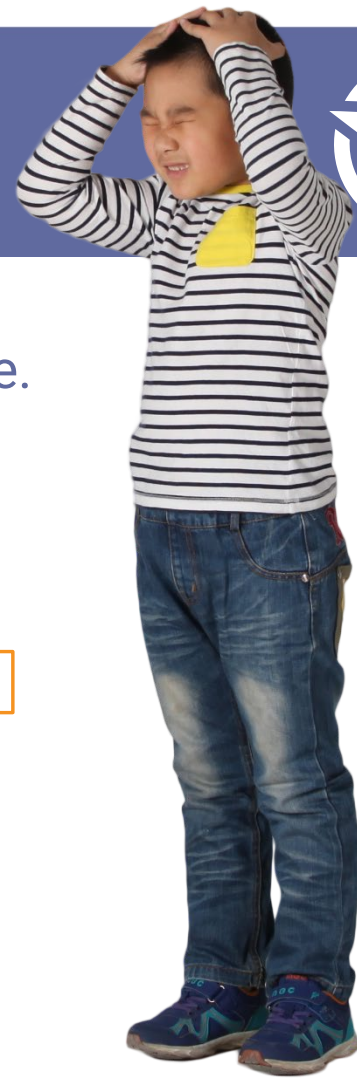


But the number of new and reactivated donors is on the decline.

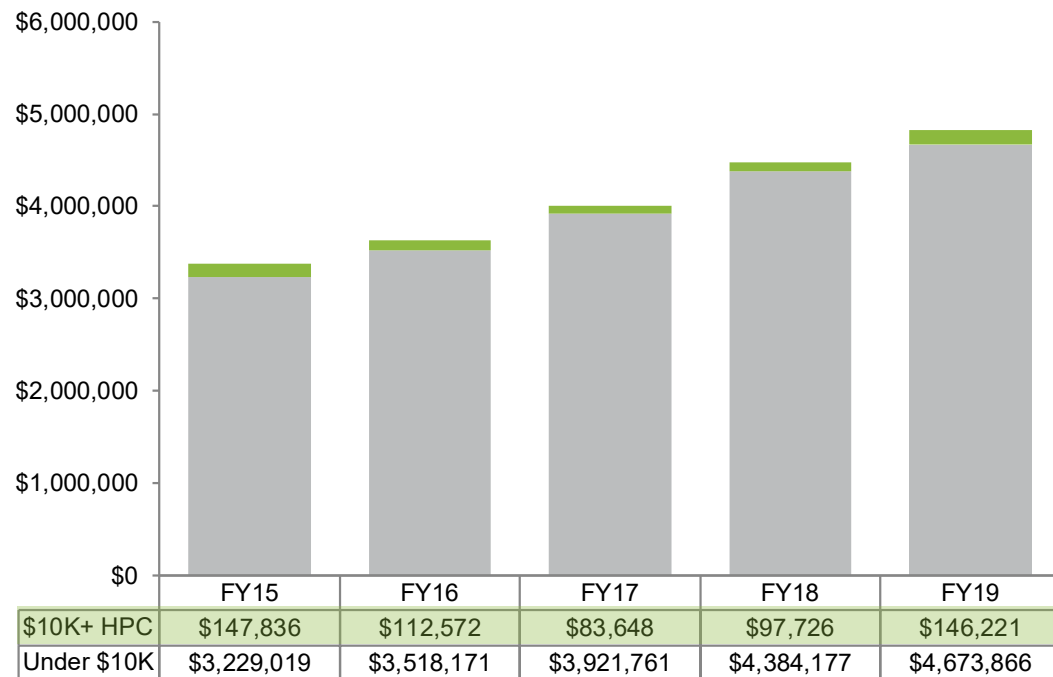
Uh oh!



-10.3%



How much revenue



Revenue is also up!
And a new opportunity is uncovered in sourcing major donor prospects.

- 90% of high net worth households give to charity
- 29K is the average annual amount from each of these households

All you have to do is find them.

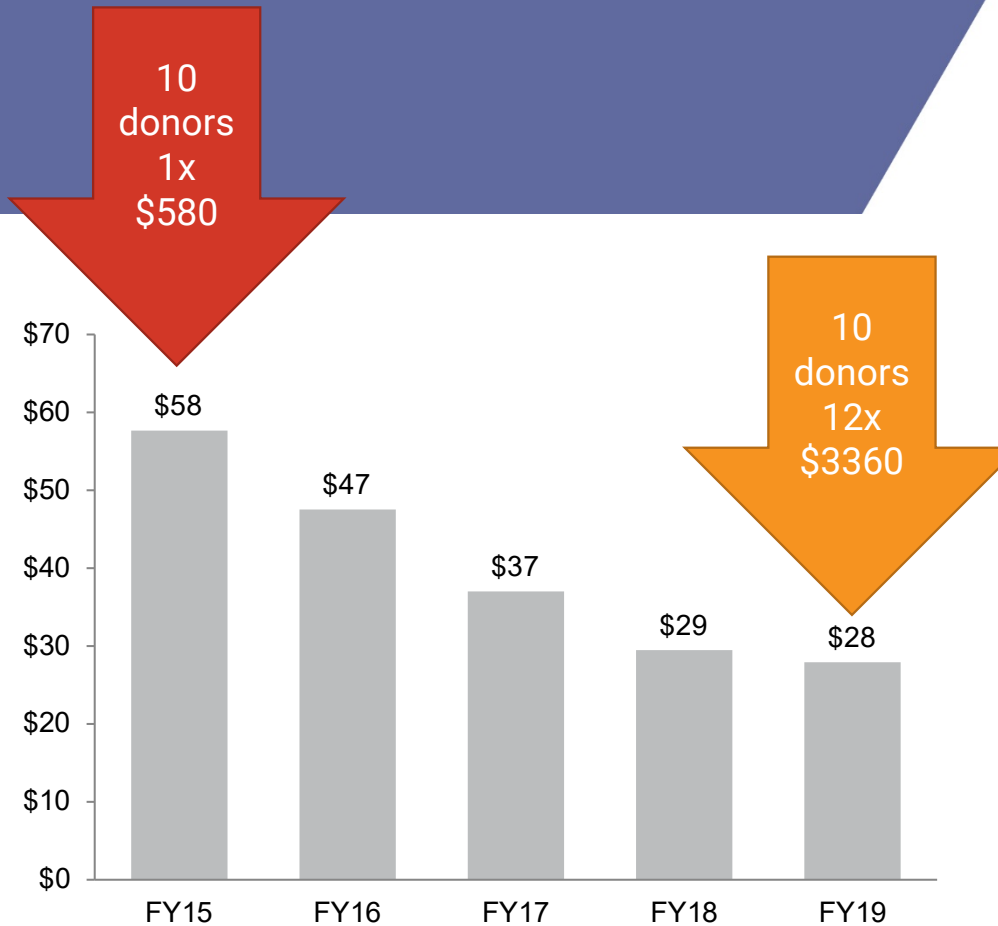
Average gift size

Why is the average gift going down?

If your organization doesn't have a monthly giving option, this would be the evidence you need to make it so.

If you have a healthy number of monthly givers, then this data shows that the NUMBER of gifts (and potentially average gift size) is on the rise.

45% of worldwide donors contribute via a monthly giving program



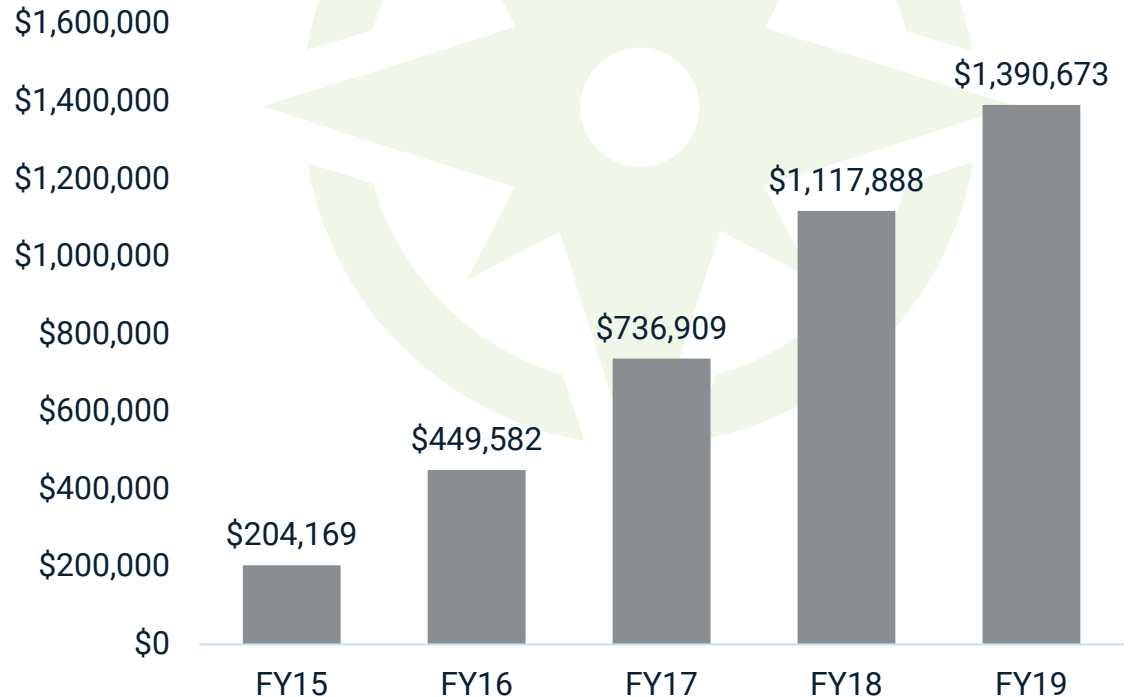
Speaking of sustainers

How does the annual rollover look?

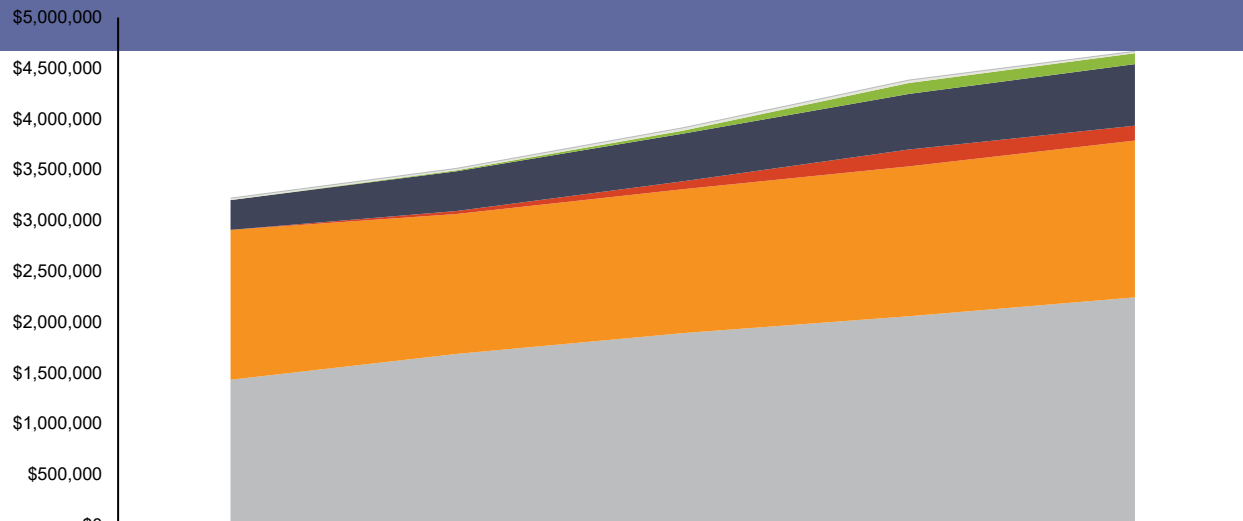
You're looking for a sharp and relatively consistent increases YOY.

FY18 was a good year, but rollover slowed in FY19.

The answer to the question could uncover an accounting issue or that you're reaching the threshold of Sustainers on your file.



How donors choose to give



No surprises here.

If you're a public media station, it stands to reason that pledge and direct mail are the biggest pieces of the pie.

But other channels aren't producing much. Consider how they might grow!





As the story of your data develops, start to think about the future.

Based on where you are now and the trends of the past, what is your projected future?

Is that what you need to happen?

- If yes, how do you maintain that direction?
- If not, why? How to you redirect and correct the trajectory?



Set Your Goals

Clear goals:

- Give you long-term vision and short-term path to follow.
- With a known path, you can develop strategy to achieve the goals.
- And it provides measurable outcomes to let you know if you have hit your goals.
 - **This is the past and the present analysis.**





Goals compared to Observations

Goals

Long-Term Goal:

Increase current donor file to increase revenue.

Observations

1. *Year-over-year increase in active donor counts and revenue.*
2. *Gains (New + Reactivated) out pace Losses (Lapsed).*
3. *The number of new and reactivated donors are declining.*



Keep Digging

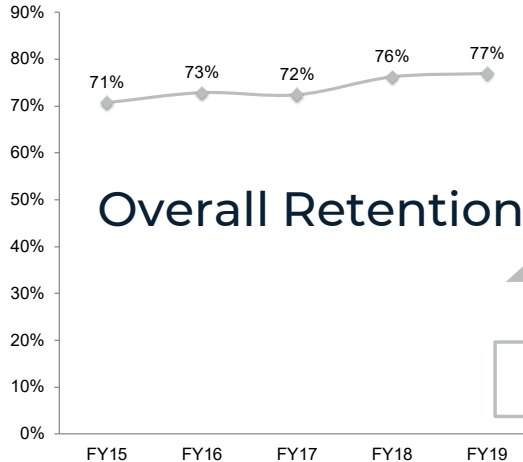
Understanding retention can help pin-point challenges.

Lifecycle Retention

Lifecycle	FY17	FY18	FY19
Multi-Year	82%	85%	84%
Second-Year	49%	59%	60%
Win-Back	60%	65%	62%

Retention by Donor Value

	FY18	FY19	
<\$10	331	404	63% 58%
\$10-\$24	2,076	2,093	67% 64%
\$25-\$49	3,128	3,467	78% 76%
\$50-\$99	10,996	12,690	79% 78%
\$100-\$999	14,327	15,579	75% 78%
\$1,000+	284	324	81% 85%





Impact of Sustainers

Current Trends - Sustainers

	Donors	Revenue	Frequency	Ave Gift	RPD
FY18	12,712	\$1,388,933.29	9.24	\$11.83	\$109.26
FY19	15,418	\$1,691,919.50	9.65	\$11.37	\$109.74
Difference	2,706	\$302,986.21	0.42	-\$0.46	\$0.48
% Change	21.3%	21.8%	4.5%	-3.9%	0.4%

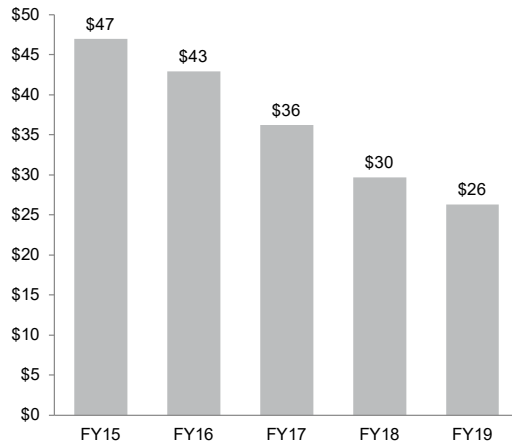
Establish a few benchmarks

- How is the Sustainer file changing and what is the impact?
- What percentage of the overall Active Donor file are Sustainers?
- How much overall Revenue comes from Sustainers?
- What is the Average Gift for Sustainers? Revenue per Donor?

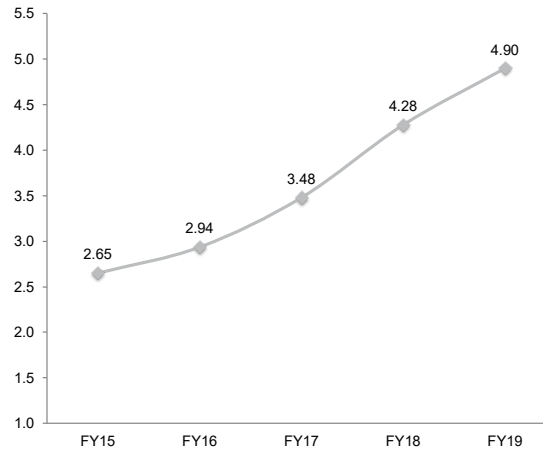
Inform your projections with the % change YOY

Giving Trends

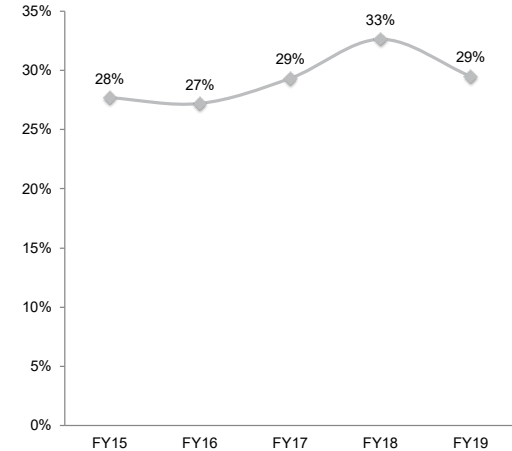
Average Gift Size



Gift Frequency

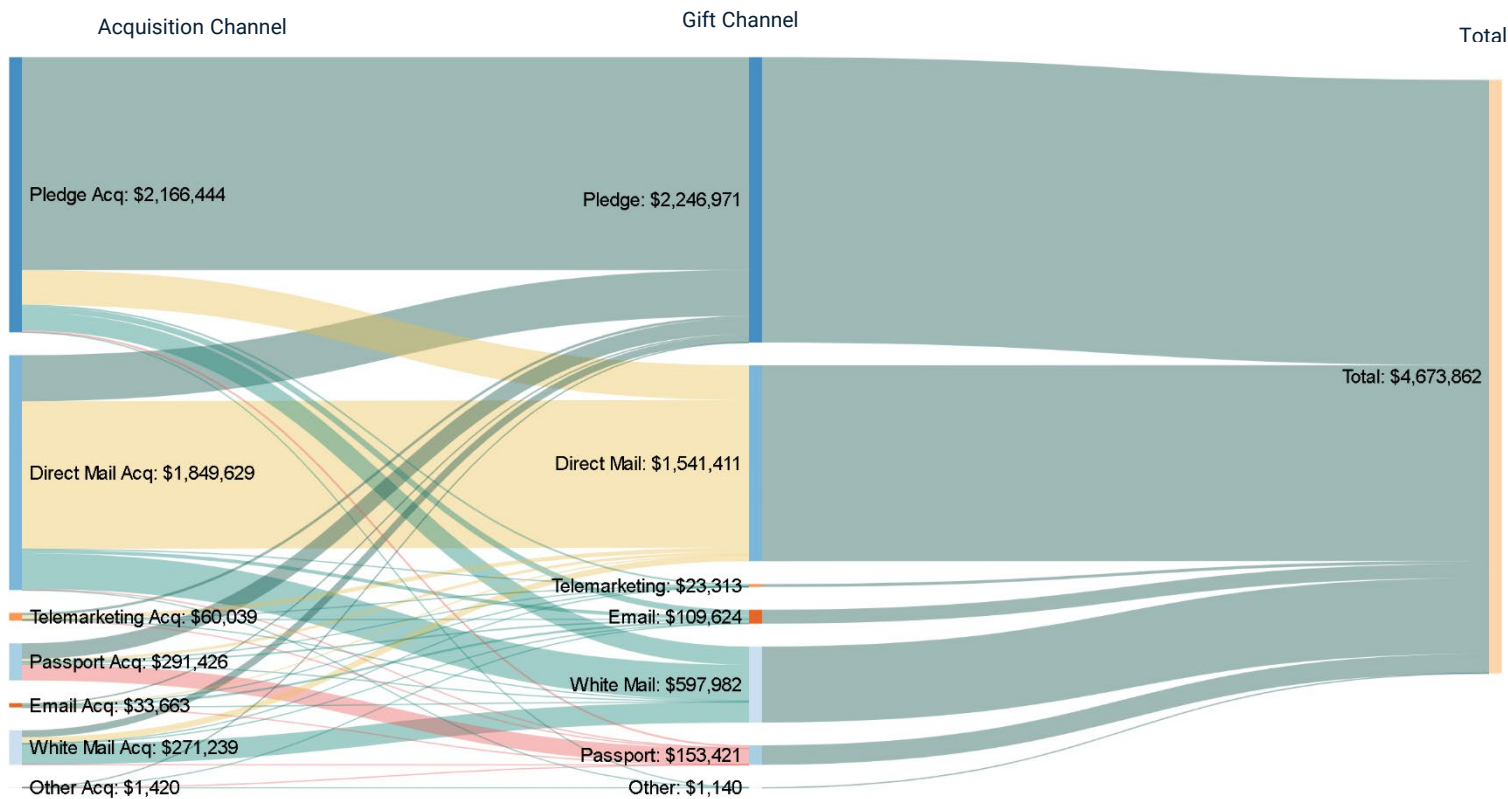


Upgrade



Decrease in Average Gift and Increase in Gift Frequency are signs of a growing Sustainer program. As sustainers grow, very important to watch the Upgrade trend.

How do donors give?



How your donors choose to renew is a useful data point

- Getting the first gift is great, but how can you ensure you get the second?
- How your donors renew can speak to their loyalty

Knowing the channels donors use to donate helps determine how to communicate.

And finally – Strategy & Execution

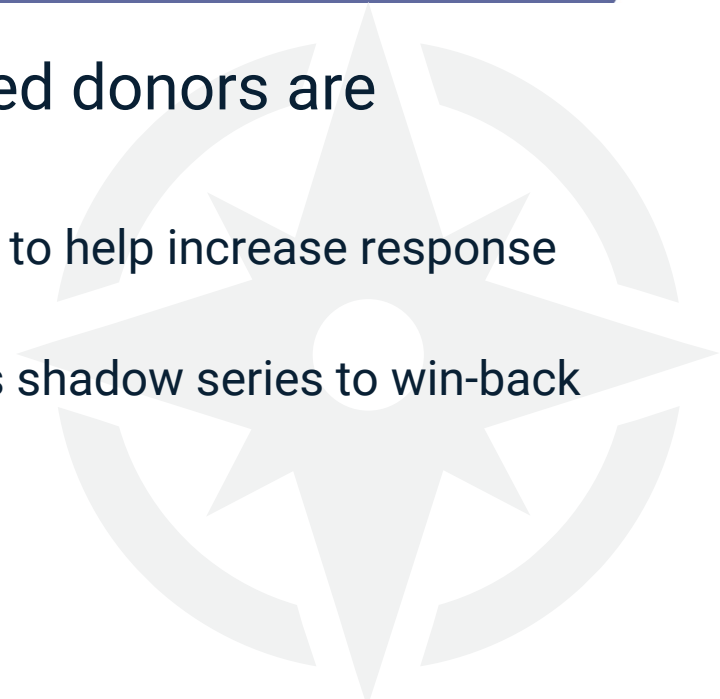
- What story is your data telling?
- What are your goals?
- What needs to happen to achieve your goals?
 - What are the problems?
 - What are the opportunities?





Develop Strategies

1. Data showed New and Reactivated donors are decreasing.
 - Test modeled lists as part of acquisition to help increase response rate and new donors.
 - Add Lapsed into the renewal program as shadow series to win-back more lapsed donors.

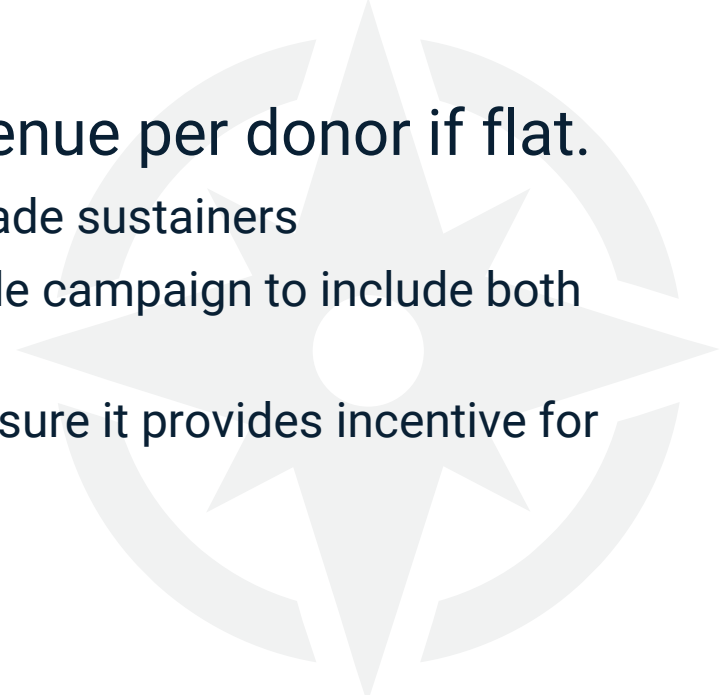




Develop Strategies

2. Sustainers are increasing, but revenue per donor if flat.

- Test telemarketing as a channel to upgrade sustainers
- Develop a targeted multi-channel upgrade campaign to include both mail and email.
- Evaluate the membership program to ensure it provides incentive for sustainers to upgrade to a higher level.

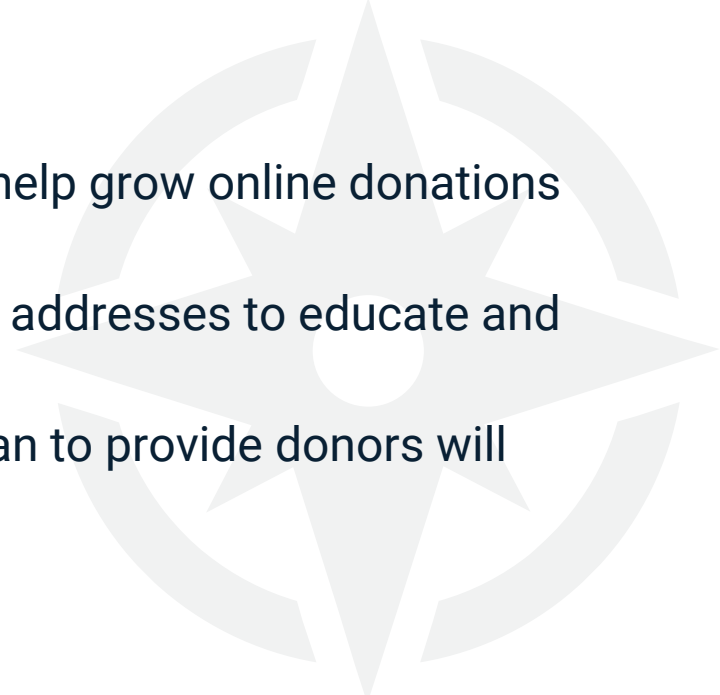




Develop Strategies

3. Strengthen online giving channels

- Launch a digital acquisition program to help grow online donations and support new donor growth.
- Develop a welcome series for new email addresses to educate and encourage new joins.
- Create and ongoing email solicitation plan to provide donors will opportunities to give online.



What is the Story of Your Data?

Your data tells a story. This story delivers the direction your donor file and revenue are moving. But it is up to you to determine if the direction is where you want to go.

By looking at data and trends of the past along with what is happening in the present provides the insight needed to put you in control of the future to move you toward your goals.



Thank You!

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Q & A

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