



ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS



Planning for the Long Haul: **Maximizing Donor Retention with your Annual Development Plan**

Elizabeth Suffredin Boyle

Senior Consultant, Campbell & Company



“Taking positive steps to reduce gift and donor losses is the least expensive strategy for increasing new fundraising gains.”

2017 AFP’s Fundraising Effectiveness Survey
afpfep.org

Starting with the end in mind...

Planning for the Long Haul

1

Remind us of what we know – donor engagement is a top focus

2

What are your tools?

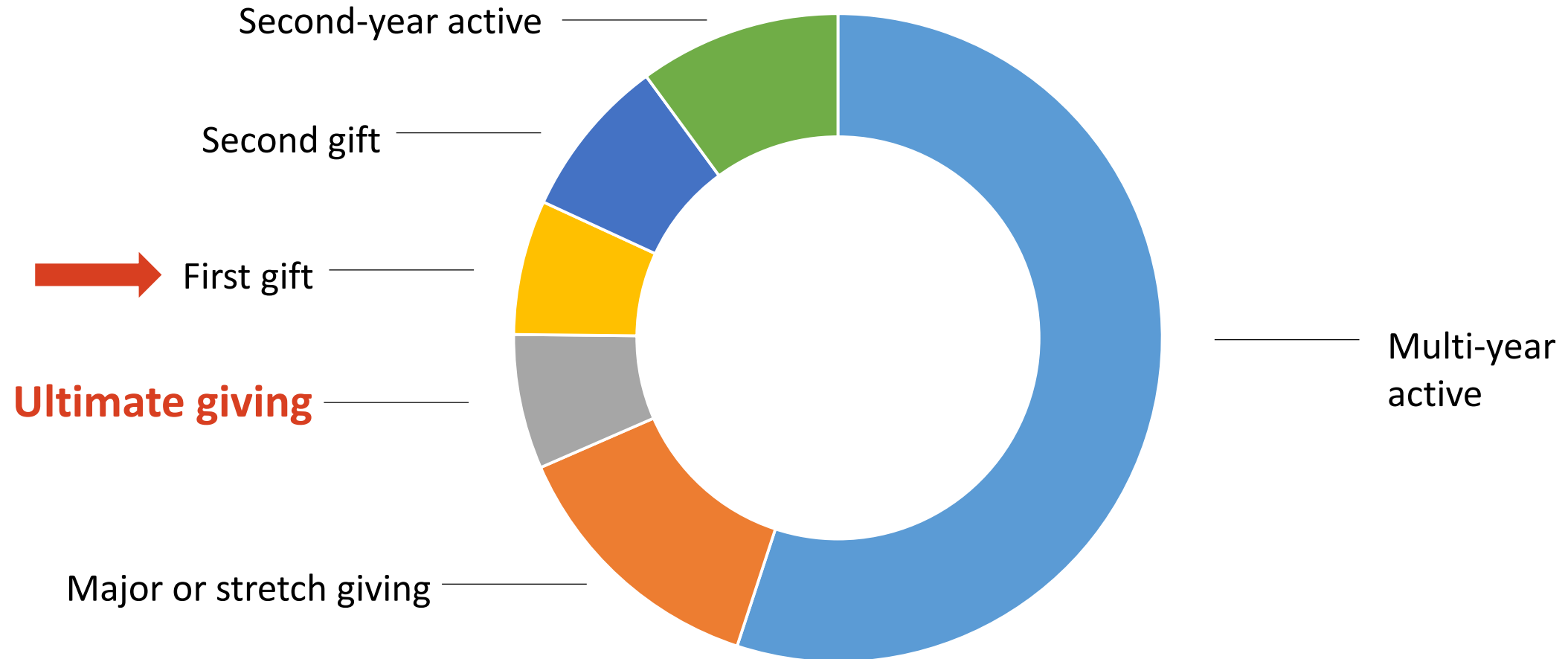
3

Leveraging tools with an eye to maximizing donor engagement

4

Building a plan

Ideal Donor Lifecycle



A Few Things about New Donor Retention

- The hardest donor to renew is a first time donor
- Typical renewal rates are 15 to 35%
- Median rates are 20 to 23%
- Goal to strive for: 40 to 45% overall
- Major donor renewal rates are often over 50%



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BUILDING
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FOR GOOD

**Numbers matter, but they don't
tell us how to build donor loyalty.**

Retention Fundraising: The New Art and Science of Keeping your Donors for Life, Roger Craver

Why donors leave:

- Feel unknown by the organization
- Poor customer service
- Inconsistent messages
- Too much communication
- Lack of information
- Lack of two-way dialogue
- Irrelevant communications

Your “Must Haves” to Keep Your Donors

- Donor perceives organization effective in achieving mission
- Donor knows what to expect from organization with each interaction
- Donor receives timely thank yous
- Donor receives opportunities to make views known
- Donor is given feeling they are part of important cause
- Donor feels involvement is appreciated
- Donor receives information showing who is being helped

First...

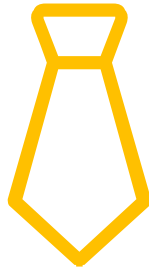


What are your tools?

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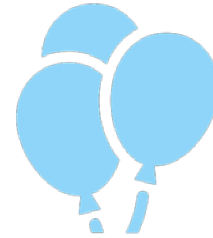
MAJOR GIFTS



CORPORATE
SPONSORSHIPS



PLANNED
GIFTS



EVENTS



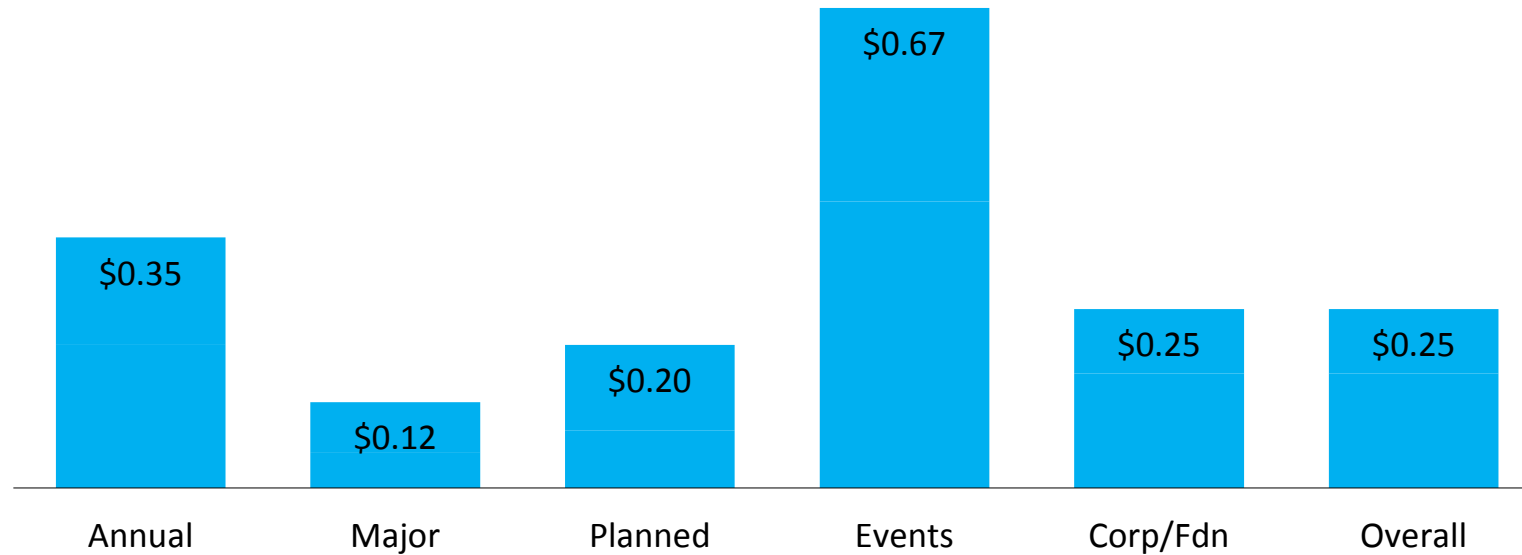
FOUNDATION
GRANTS



STEWARDSHIP

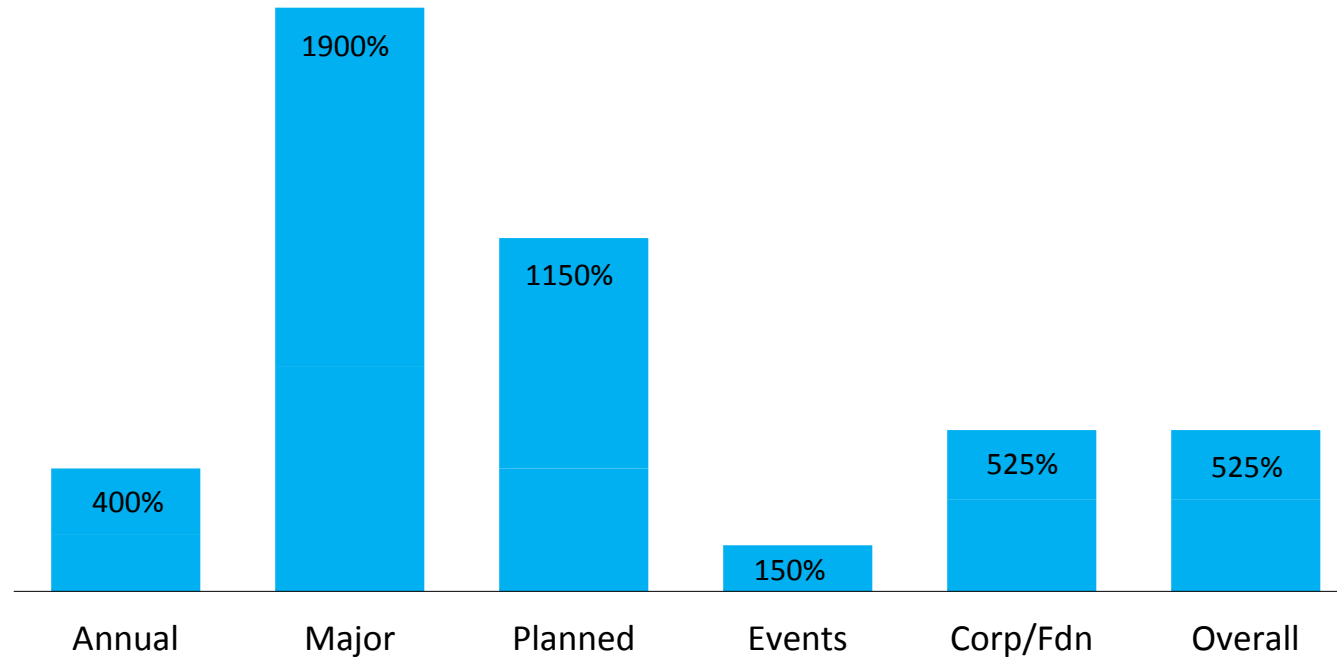
Plan with the Right Tools

Cost Per Dollar Raised

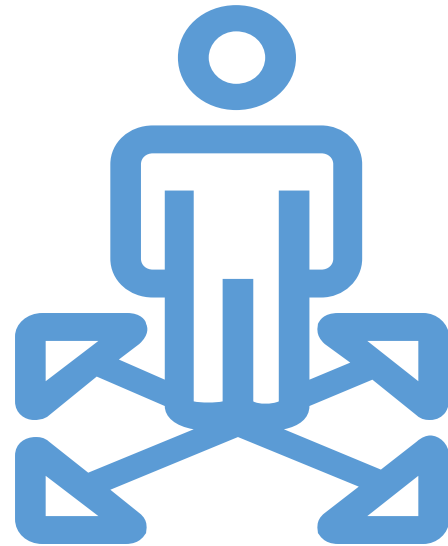


Know what to expect from your tools

Return on Investment



But really – this is first...



Who are your stakeholders?

For each stakeholder group there will be a different reason to support your organization – your donor strategy is tied to those reasons.



Program
participants
/alumni



Families of
participants



Community
members, friends,
interested parties



Corporations
and
Foundations

Donor Segments

Why do people give?

Donors are not alike. We found that, statistically, donors break out into six behavioral segments



Repayer

"I give to my alma mater"
"I support organizations that have had an impact on me or a loved one"

Casual Giver

"I primarily give to well known nonprofits through a payroll deduction at work"
"I donated \$1,000 so I could host a table at the event"

High Impact

"I give to the nonprofits that I feel are generating the greatest social good"
"I support causes that seem overlooked by others"

Faith Based

"We give to our church"
"We only give to organizations that fit with our religious beliefs"

See the Difference

"I think it's important to support local charities"
"I only give to small organizations where I feel I can make a difference"

Personal Ties

"I only give when I am familiar with the people who run an organization"
"A lot of my giving is in response to friends who ask me to support their causes"

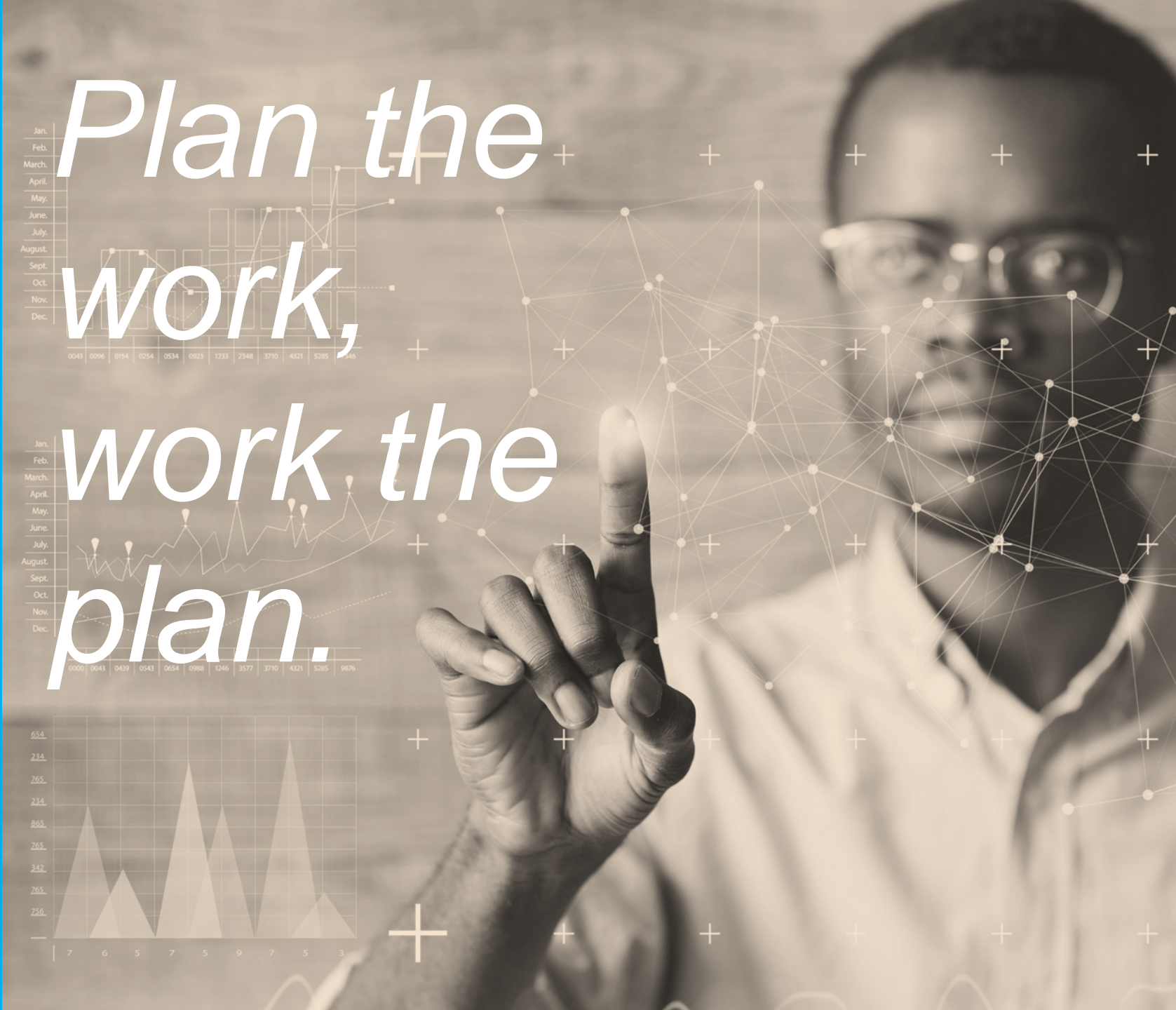
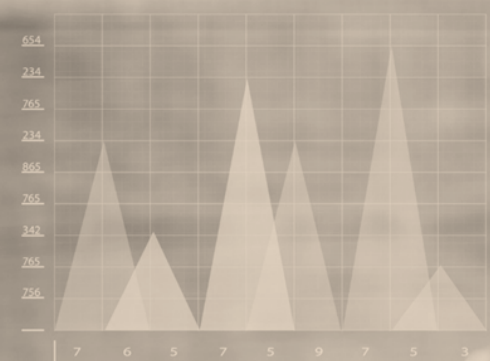


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Strategies for Implementation

*Plan the
work,
work the
plan.*





Strategy behind each element

Tool: Annual Giving

WHY ANNUAL
GIVING?

WHAT, WHEN, WHY? WHERE
DOES ANNUAL GIVING FIT
INTO YOUR GOALS?

HOW DO YOU USE
THIS FOR
ENGAGEMENT?

Strategy behind each element

Tool: **Events**

WHY EVENTS?

HOW DO EVENTS FIND
AND KEEP DONORS?

WHAT ARE THE RISKS
WITH EVENTS?



Strategy behind each element

Tool: Major and Planned Giving

WHY MAJOR AND
PLANNED GIVING?

WHAT ARE THE
CHALLENGES?
WHAT IS THE ROI?

HOW IS THIS DONOR
ENGAGEMENT?

Strategy behind each element

Tool: Corporate Giving

WHY CORPORATE
GIVING?

HOW IS THIS PART
OF DONOR
ENGAGEMENT?

WHAT DO
CORPORATIONS
TEACH US ABOUT
STEWARDSHIP?



Strategy behind each element

Tool: **Foundation Giving**

WHY FOUNDATION
GIVING?

WHAT IS THE ROI?

WHAT DO YOU NEED
TO IMPLEMENT?

Timing and Structure



Focus on your goals, bandwidth, and ROI

Strategies that Work – Building Loyalty and Retention

- **Build a culture of philanthropy:** everyone equipped to answer donor questions
- **Metrics drive action:** track upgrades, downgrades, lapsed, gift size, and first gifts
- **Remind donor of history:** “Your tradition of giving started in 2010”
- **Share the impact donors helped to create**
- **Implement donor welcome packages and calls**

Strategies that Work – Building Loyalty and Retention

- Focus team on stewardship of *first-time* donors at all levels
- Offer experiences that matter to donors - awareness tours
- Segment by program interest area, not mode of giving (event, mail, etc.)
- Ask corporate donors what recognition they want; one size does not fit all

A deliberate but nimble plan focused on goals, involving the entire organization, will build lasting success...



Data-driven plans inform strategy and donor engagement



Simple messages that focus on impact and can be used throughout the year



Build in high- and low-touch activities to keep donors engaged



Plan activities by defining your goals, leverage existing resources



Keep your eye on the target, tweak and refine but stick to the plan

Lasting Momentum: The Value Behind a Plan





THANK YOU

For a copy of this presentation and handouts,
please email Elizabeth Suffredin Boyle
at elizabeth.boyle@campbellcompany.com

Campbell & Company, www.campbellcompany.com
(312) 644-7100 | info@campbellcompany.com



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