



Medical & Healthcare
Advancement

Reimagining Donor Engagement: Data-driven Program Development

May 2025

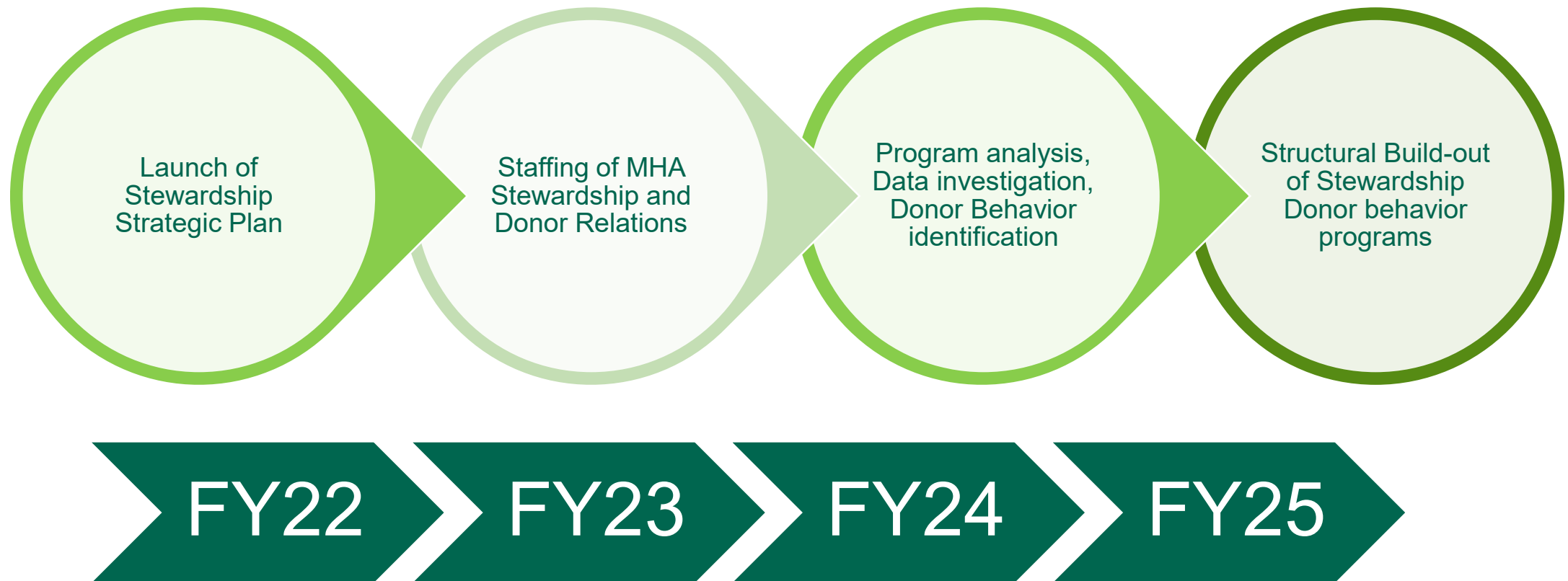
Introduction: Donor Behavior Programs

- **Intentional**, data-driven program design
- **Sustainable**, program measured and monitored while building capacity
- **Accountable**, built-in metrics for evaluation of programs' effectiveness

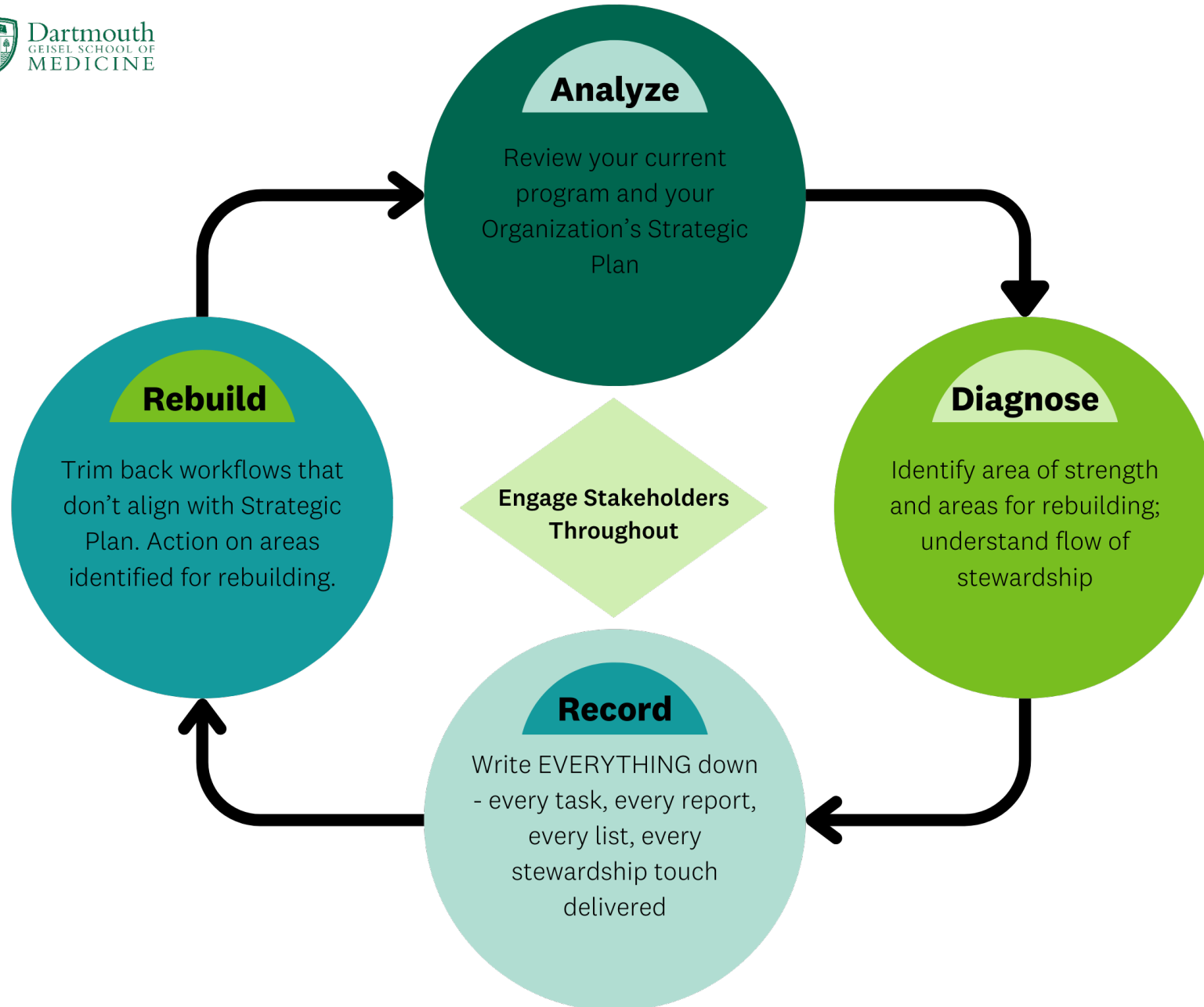


Foster Gratitude.
Instill Trust.
Show Impact.

Journey to Reimagine Donor Engagement

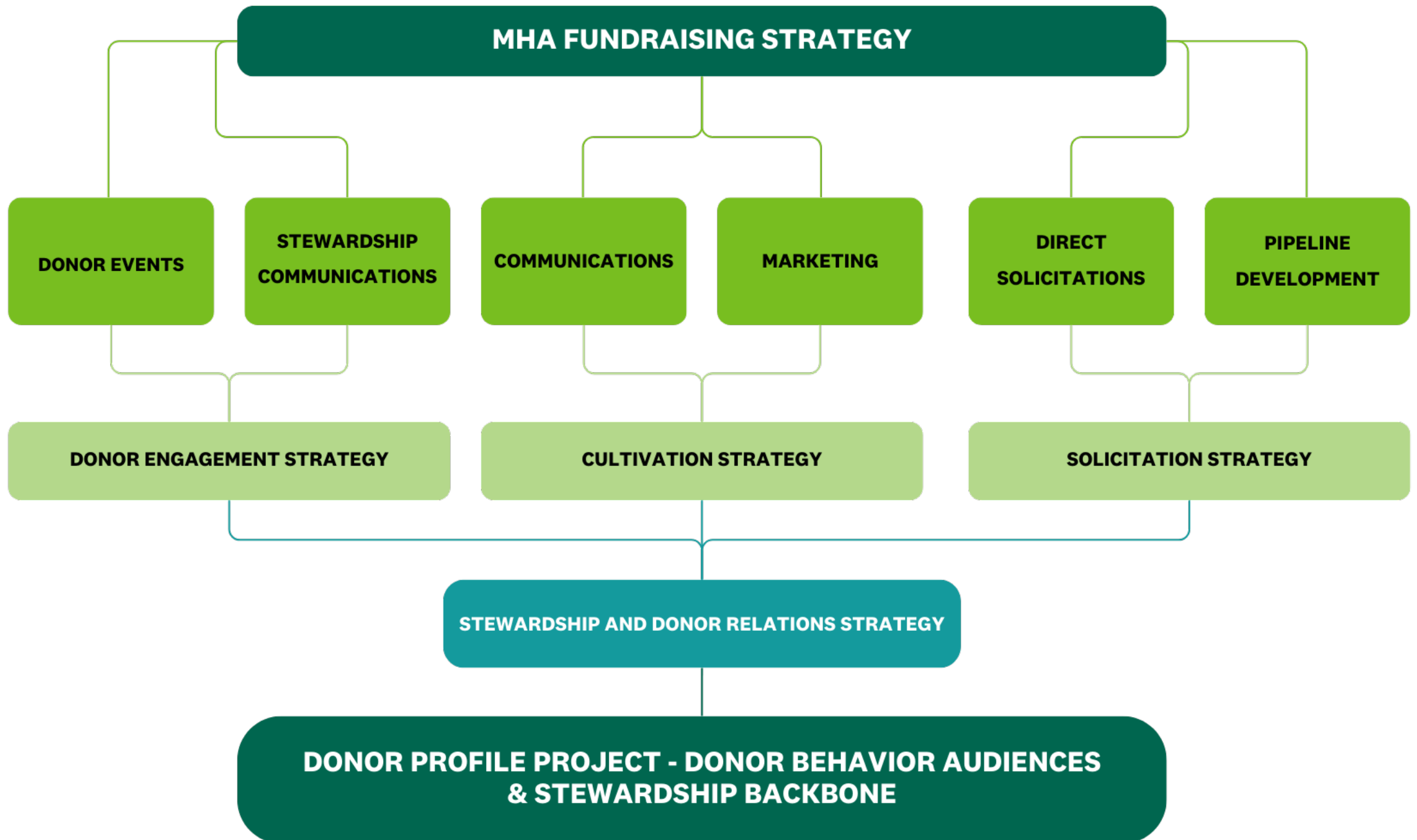


The Plan



The Record

Policy - Stewardship Acknowledgement									
Strategic Objective	Timing	Stewardship Tool	Department	Trigger	Schedule	FY24 Notes	Stewardship Audience	Behavior	
Acknowledgement	Ongoing	Leadership Acknowledgement							
	Acknowledgement	Ongoing	Leadership Acknowledgement	Cancer	Donation greater than \$5,000	Weekly	Steve Leach	Cancer Major Donors	Major Gift to C
	Acknowledgement	Annual	Leadership Acknowledgement	Cancer	Language Refresh	Quarterly		Cancer Major Donors	Major Gift to C
	Acknowledgement	Ongoing	Leadership Acknowledgement	Children's	Donation greater than \$1,000	Weekly		Children's Major Donors	Major Gift to Cl
	Acknowledgement	Annual	Leadership Acknowledgement	Children's	Language Refresh	Quarterly		Children's Major Donors	Major Gift to Cl
	Acknowledgement	Ongoing	Leadership Acknowledgement	CEO DH	Donation greater than \$100,000	Weekly	Custom tailored language	Major Donors	Major Gift
	Acknowledgement	Ongoing	Leadership Acknowledgement	DHMC	Donation greater than \$5,000	Weekly	Sue Reeves - Retiring, need to re-assess for future	Major Donors	Major Gift
	Acknowledgement	Annual	Leadership Acknowledgement	DHMC	Language Refresh	Quarterly		Major Donors	Major Gift
	Acknowledgement	Ongoing	Leadership Acknowledgement	Geisel	Donation greater than \$5,000	Weekly	Duane Compton	Geisel Major Donors	Major Gift to G
	Acknowledgement	Annual	Leadership Acknowledgement	Geisel	Language Refresh	Quarterly		Geisel Major Donors	Major Gift to G
	Acknowledgement	Ongoing	Leadership Acknowledgement	MHA	Matt's Portfolio	Weekly	Reviewed by Gift officers	Major Donors	Major Gift
	Acknowledgement	Ongoing	Leadership Acknowledgement	MHA	Trustee Donation	Weekly	Matt Haag Acknowledgement	Trustee Donors	Major Gift
	Acknowledgement	Ongoing	Leadership Acknowledgement	CEO DH	Trustee Donation	Weekly	Joanne Conroy Acknowledgement	Trustee Donors	Major Gift
	Acknowledgement	Annual	Leadership Acknowledgement	MHA	Language Refresh	Quarterly		Trustee Donors	Major Gift
	Acknowledgement	Annual	Leadership Acknowledgement	VNH	Donation greater than \$5,000	Weekly		Major Donors	Major Gift
	Acknowledgement	Annual	Leadership Acknowledgement	VNH	Language Refresh	Annual			
	Acknowledgement	Ongoing	Leadership Acknowledgement	Cancer, Children's, DHMC, Geisel	VIP Attribute	Weekly	Gift Officer requested acknowledgement regardless of gift size	Major Donors	Major Gift
Acknowledgement	Ongoing	Baseline Acknowledgement							
	Acknowledgement	Annual	Baseline Acknowledgement	Cancer	PROUTY	Quarterly	Annual refresh of all PROUTY acknowledgements	Cancer Donors	Structural
	Acknowledgement	Ongoing	Baseline Acknowledgement	Cancer	PROUTY Designated Donation	Weekly	Jaclyn Postcards	Cancer Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	Children's	CHd Events	July	Annual plan and refresh of CHd Events acknowledgements	Children's Donors	Structural
	Acknowledgement	Ongoing	Baseline Acknowledgement	Children's	CHd Event Donation	Weekly	Olive Postcard	Children's Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Honor a Caregiver	January	Annual plan and refresh of all Honor a Caregiver acknowledgements	Donors	Structural
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Honor a Caregiver	March	Custom campaign buckslips, custom digital acknowledgements	Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Direct Mail donation (mailed check)	Weekly	4 Thematic buckslips for FY24 is timely impact stewardship after any gift, attached with receipt	Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Online Gift Donation	Undefined	Refresh giving page language, and receipt/confirmation page stewardship language	Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Employee Giving	August	Annual plan and refresh of all Employee Giving acknowledgements	Employee Donors	Structural
	Acknowledgement	Annual	Baseline Acknowledgement	Annual Giving	Employee Giving	September	Custom campaign buckslips, custom digital acknowledgements	Employee Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	MHA	End of Calendar Year	January	Payroll deduction and recurring gifts	Employee Donors	Donation
	Acknowledgement	Ongoing	Baseline Acknowledgement	CFR	CFR Donation / Grant Award	Weekly	Template letter delivery	Foundation Donors	Donation
	Acknowledgement	Annual	Baseline Acknowledgement	CFR	CFR	July	Refresh of CFR Template letters and review data in FY24	Foundation Donors	Structural
Acknowledgement	Ongoing	Gift Receipting							
	Acknowledgement	Annual	Gift Receipting	MHA	Recurring Gift / Payroll Deduction	January	Calendar look-back, pledge payments, year in review	Donors and Employee Donors	Recurring Dona
	Acknowledgement	Ongoing	Gift Receipting	MHA	Online Gift Donation	Winter	Online gift receipt delivery and standard receipt language	Donors	Donation via Gi
Acknowledgement	Ongoing	Gift Receipting							
	Acknowledgement	Annual	Gift Receipting	MHA	Direct Mail donation (mailed check)	Weekly	Printed receipt	Donors	Donation via Di
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Acknowledgement	Permanent	Policy - Stewardship Acknowledgement							
	Acknowledgement	Annual	Policy - Stewardship Acknowledgement	MHA	Assessment of Acknowledgement Process	Fall	Review and diagnose current program and make suggestions for improvements to implement in FY25	Internal partners	Structural
Acknowledgement	Permanent	Policy - Stewardship Acknowledgement	MHA	Creation of policy in FY24	April	Establish policy for expectations of acknowledgements for MHA Stewardship office	Internal partners	Structural	
Engagement	Permanent	Policy - Stewardship Engagement							
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Engagement	Ad-hoc	Access - Leadership							
	Engagement	Annual	Access - Leadership	MHA	Assessment of Leadership Access program	December	Review and diagnose current program and make suggestions for improvements to implement in FY25	Internal partners	Structural
Engagement	Permanent	Access - Leadership	MHA	Creation of policy in FY24	TBD	Once a policy is created, then this tool can be deployed to respond to strategic STW initiatives	Internal partners	Structural	
Engagement	Ongoing	Access - Information							
	Ad-hoc	Access - Information	MHA	Assessment of Information Access Engagement tool	TBD	Review and diagnose current program and make suggestions for improvements to implement in FY25	Internal partners	Structural	
Engagement	Permanent	Access - Information	MHA	Creation of policy in FY24	TBD	Once a policy is created, then this tool can be deployed to respond to strategic STW initiatives	Internal partners	Structural	



Donor Profile Project — Seeking to Answer

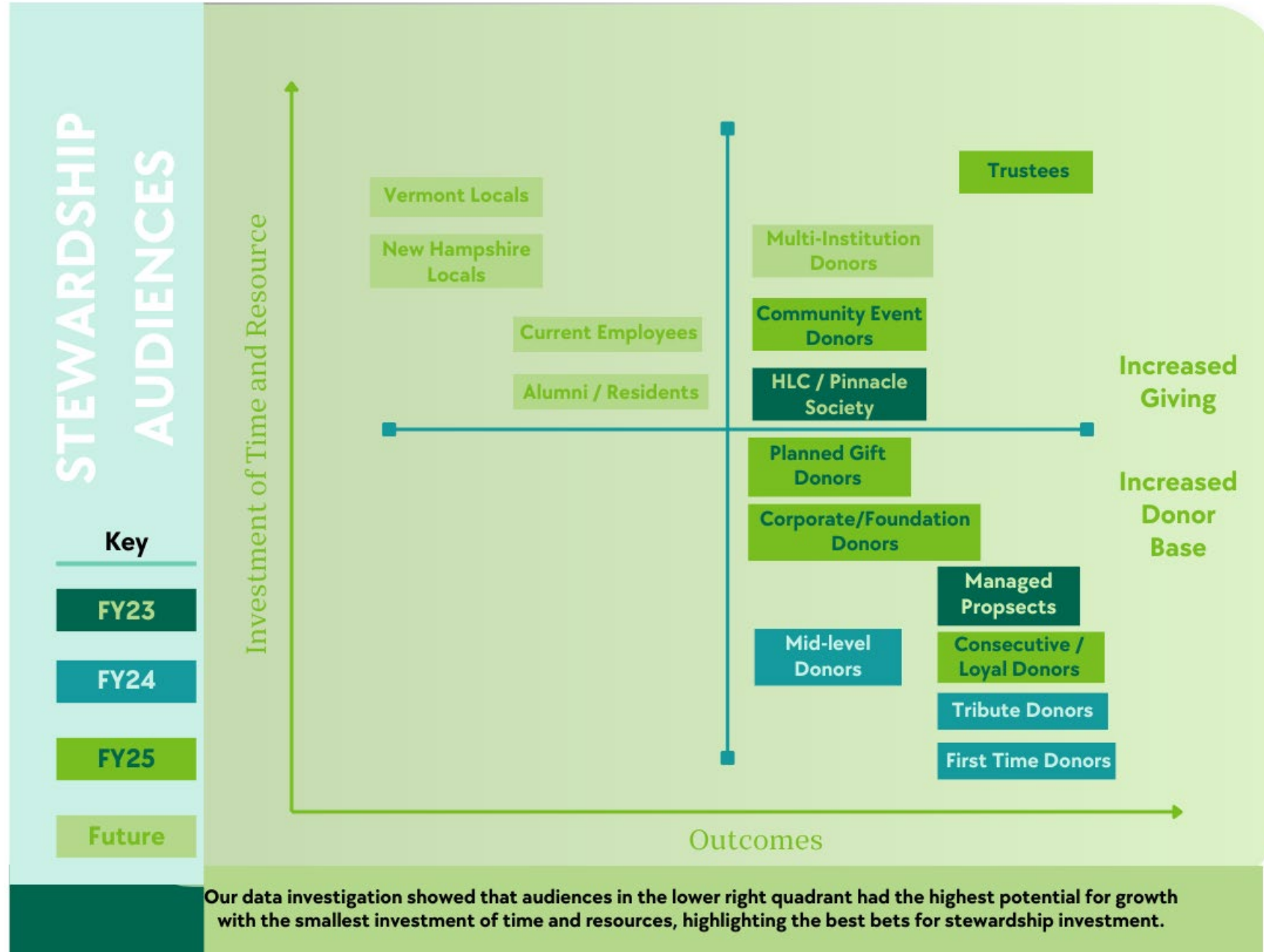
- **Who** are our donors?
- **Where** are they coming from?
- **What** are their motivators?
 - *Focused on last 5 years**
 - *Inclusive analysis, rather than exclusive*
 - *Except: Member Institutions excluded at onset*
- There are almost endless opportunities to **retain** our donors and **amplify** their giving

Antiquated best practices told us to look at giving thresholds (amounts) – modern Donor Relations best practices focus on the **donor behavior** – *how, where, when*

***The Data Request:**



Stewardship Audiences – Best Bets for Investment



Circle of
Excellence
AWARDS



Donor Engagement

Foster Gratitude.
Instill Trust.
Show Impact.

Focus on Priority
Behavior Audiences:

First Time Donors

Mid-Level Donors

Tribute Donors

Loyal Donors

First Time Donors

- **Motivated by:**
 - Recognition of their action
 - Recognition of their existence
 - Gratitude of donor relationship
- **Synergy:**
 - First Step in Donor Engagement pathway

Define: Mid-level

- **What is a mid-level donor?**
 - Donor between annual fund capacity and major gift capacity, \$250 - \$25K
 - Threshold is commiserate with strategy; Intentionally flexible
 - *At the launch of updated Engagement programs, we will use \$250 as 'mid-level' threshold*
- **Strategic Goal:**
 - For each Donor Behavior segment, incorporate an elevated experience for donors who enter our pipeline as a mid-level donor or grow into a mid-level donor.

Tribute Donors

- **Motivated by:**
 - Community member involvement; philanthropy
- **Identified Needs:**
 - Thank our tribute donors (we weren't!)
 - FAQ website landing page for questions received by Stewardship
- **Synergy:**
 - Alternate First Step, second step, in Donor Engagement pathway
 - Gift officer tool for solicitation conversations around Tribute giving info

Loyal Donors

- **Motivated by:**
 - Feeling needed, important to an institution
 - Continued engagement and education on impact
 - Trust in loyal donor complexity
 - They know they need to give, "just remind them"
- **Synergy:**
 - Second, Third Step in Donor Engagement pathway
- **Novelty:**
 - Feedback and support of Development Committee of Board of Trustees as loyal donors – working group to develop messaging and strategy

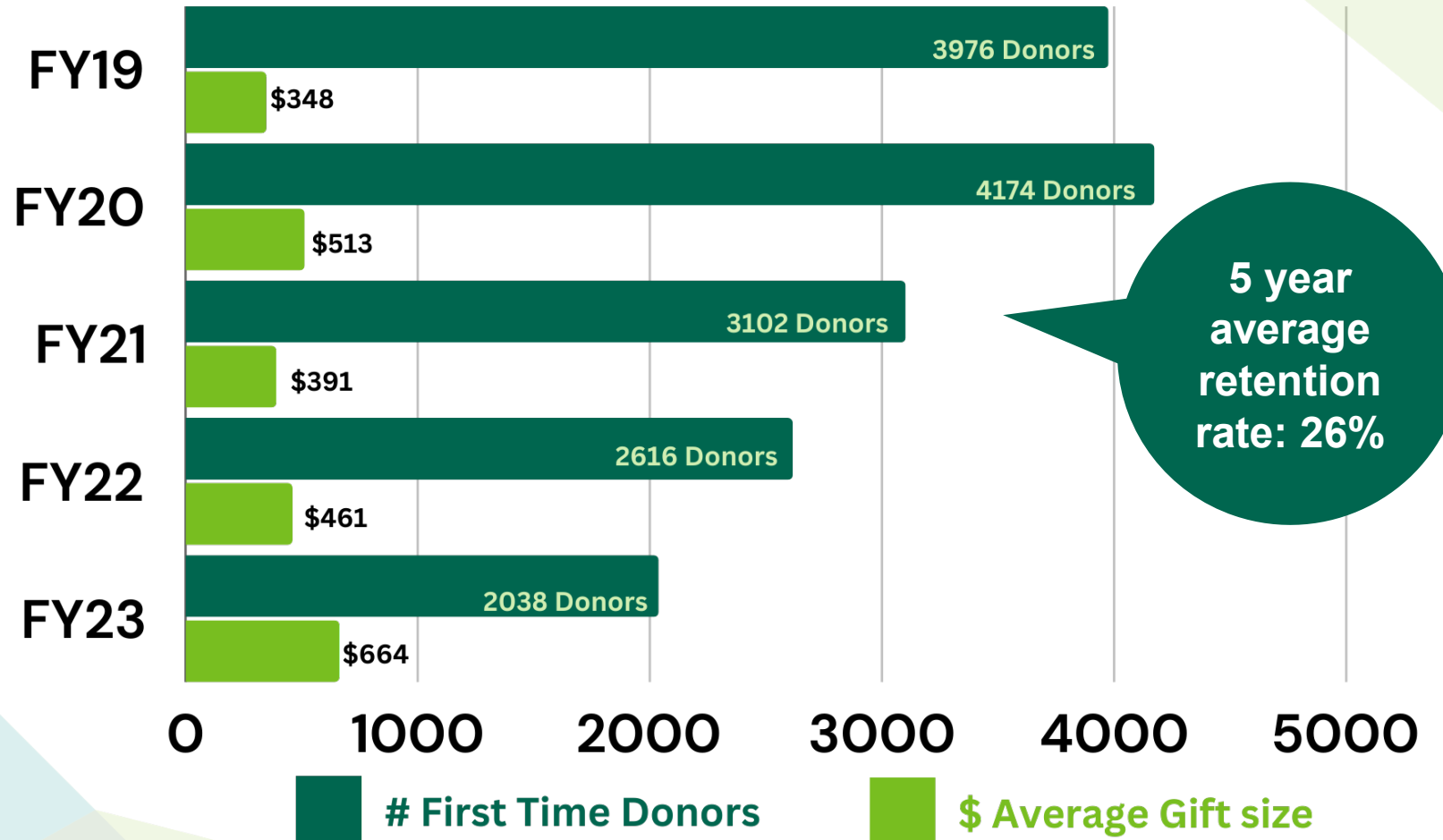
First Time Donors

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Data Analysis

- 1) More than 3K New Donors acquired per year, for ~\$3M of total revenue. Not equally retained across all audiences.
- 2) Strong program potential for positive impact on donor retention through stewardship investment
- 3) Highlights the need for a lower 'mid-level' entry point to promote pipeline growth

FIRST TIME DONORS



Strategic Stewardship Goals

New Donors – Behavior Based Program

- Assure the stewardship of New Donors to any MHA unit and member institutions, and seek to increase continued and amplified giving year to year
- Grow affinity of New Donors to their area of interest by creating a step in the donor experience that welcomes, thanks, and educates donors on unit impact
- Develop a two-tiered entrance to an Annual-level / Mid-level donor pipeline experience program to enhance fundraising efforts for the future

Define: Mid-level

- What is a mid-level donor?
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 - Threshold is commiserate with strategy; Intentionally flexible
 - ***At the launch of updated Engagement programs, we will use \$250 as ‘mid-level’ threshold***
- Strategic Goal:
 - For each Donor Behavior segment, incorporate an elevated experience for donors who enter our pipeline as a mid-level donor or grow into a mid-level donor.

Mid-Level Donors

- Identified potential for quicker trajectory to Mid-level or Major giving
 - Looked at entrance points and levels, velocity from first gift to largest, and worked within the MHA ecosystem to identify gap of mid-level donors in pipeline, preparing for future campaign

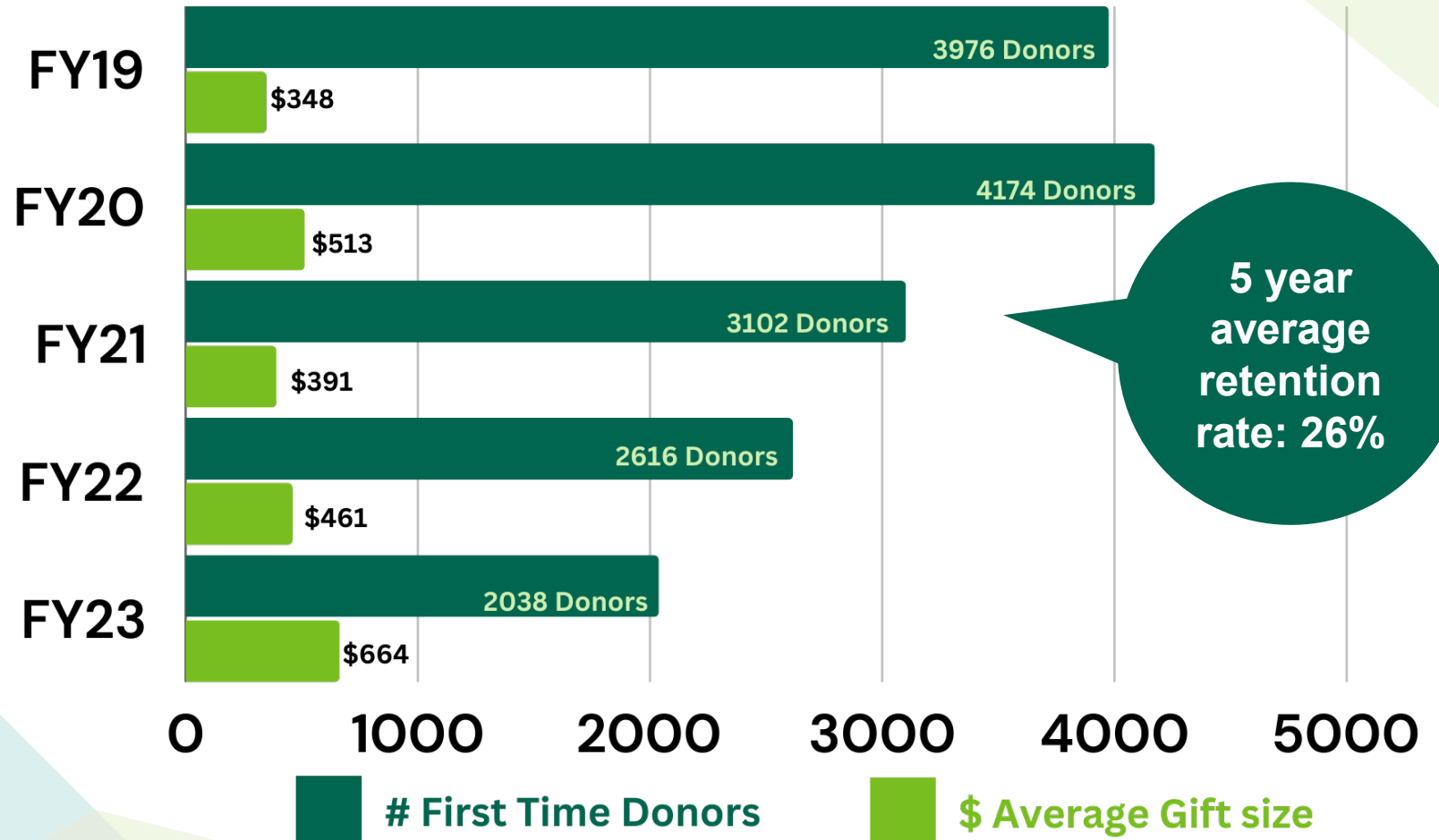
Synergy:

- Synergy with frontline fundraisers for Gift Officer identification work; qualification work
- Elevated First Step in Donor Engagement pathway
 - Leads to a more premiere donor engagement pathway to retain, grow giving, and deepen affinity
- Donor Journey Consideration: Mid-level as a destination

Data Analysis

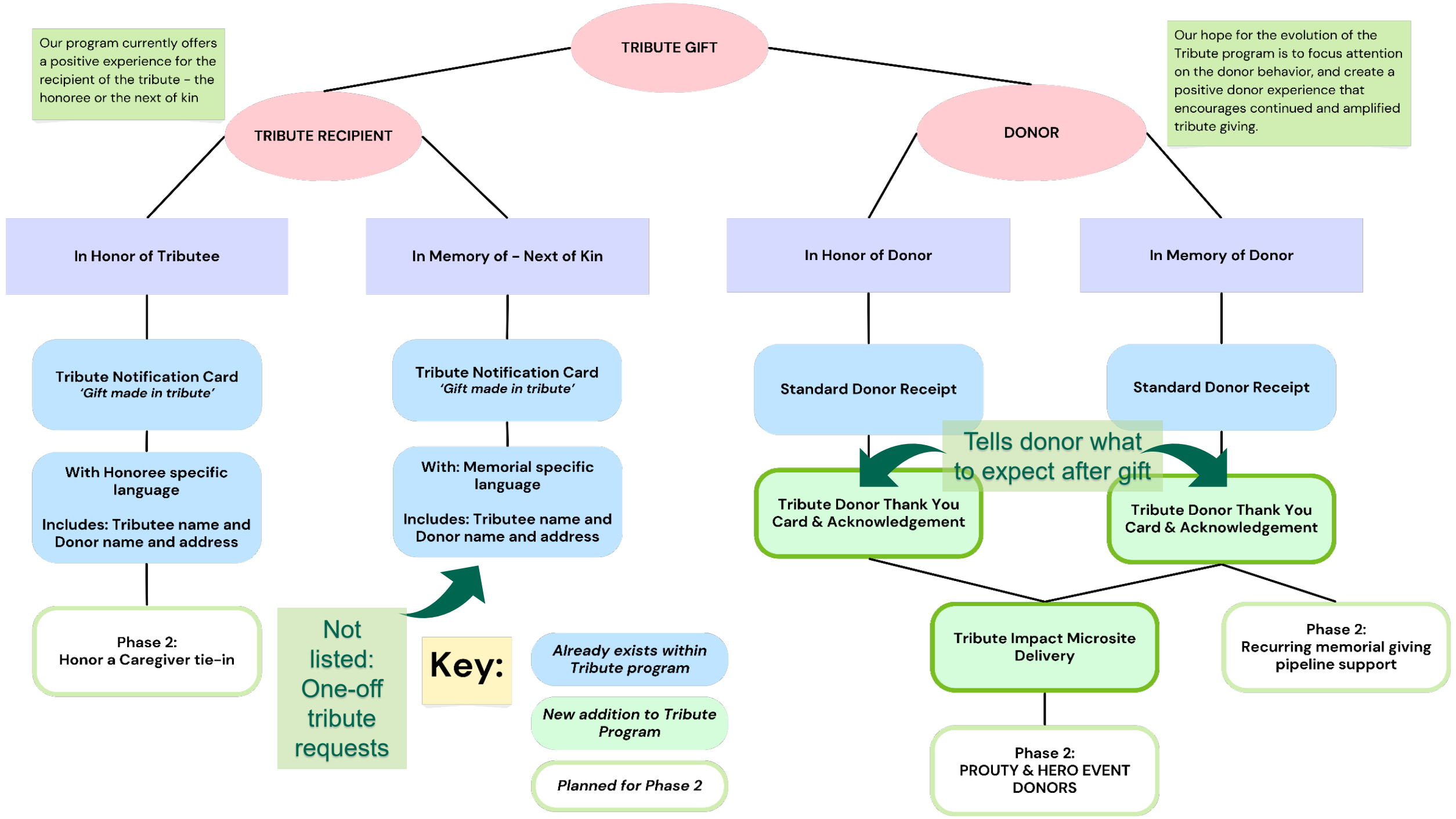
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FIRST TIME DONORS



Tribute Donors

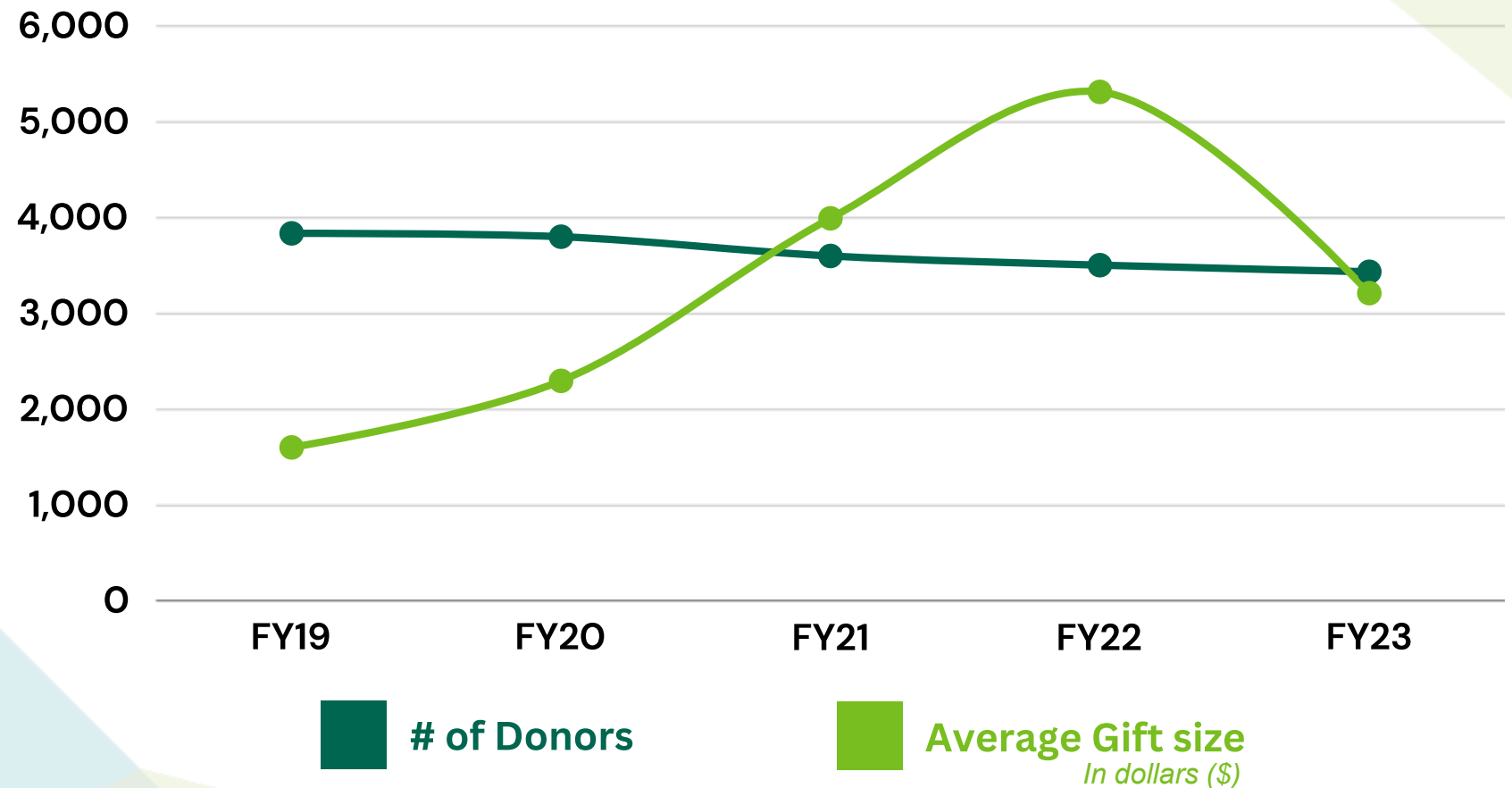
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Data Analysis

- Downward trend line on number of donors
- Potential for mid-level giving pipeline support
 - Avg. gift is ~\$3.2K
- Significant entry-point for new donors
 - ~750 New Donors in FY23
- Gifts in Honor are larger on average than gifts in Memory

TRIBUTE DONORS



Strategic Stewardship Goals

Tribute Donors – Behavior Based Program

1. **Recognize and steward tribute gifts** made by our community– **foster community connection** between donor philanthropy and tribute recipient at DH and beyond
2. **Enhance tribute donor experience** at Dartmouth health and member hospitals; aim to **increase retention rates** for this donor behavior group
3. **Communicate with tribute donors based on giving behavior**, provide multi-step path toward **sustained and amplified giving** with Dartmouth Health and Members

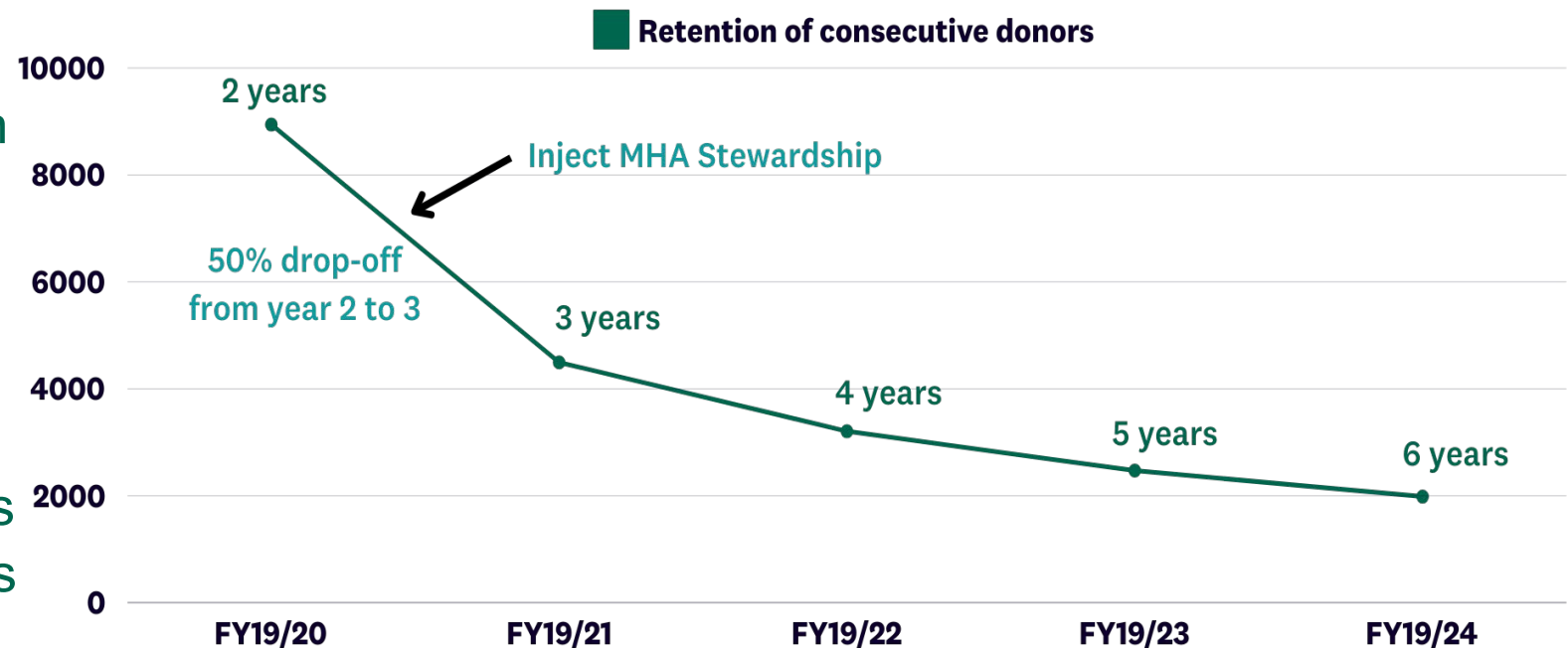
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 - Trust in loyal donor complexity
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- Synergy:
 - Second, Third Step in Donor Engagement pathway
- Novelty:
 - Feedback and support of Development Committee of Board of Trustees as loyal donors – working group to develop messaging and strategy

Analysis

- We have strong drop off in consecutive behavior between year 2 and 3
- Consecutive donors have higher likelihood to be lifelong donors
- Consecutive giving contributes to major gift pipeline as well as supporting robust mid-level giving
 - Annual Median Gift is \$102
 - Annual Avg Donor Value is \$728

Consecutive Retention



Following the donor journey from FY19 to FY24, we see a dramatic drop in consecutive giving retention between year 2 and year 3 of consecutive giving

The What

Consecutive giving

- **Definition:** Year over year giving, in a row, without lapse (5 years consecutive)
- **Exclusion:** Donors who miss a Fiscal Year of giving, unaware of CY vs FY
- **MHA:** recognize 2 years of consecutive giving as part of a loyal behavior definition

Loyal giving

- **Definition:** Total number of years given, arbitrary threshold (10+ years)
- **Exclusion:** Younger alumni and new donors to the organization
- **MHA:** Recognize 3 of last 5 years to catch donors who fall from consecutive pipeline

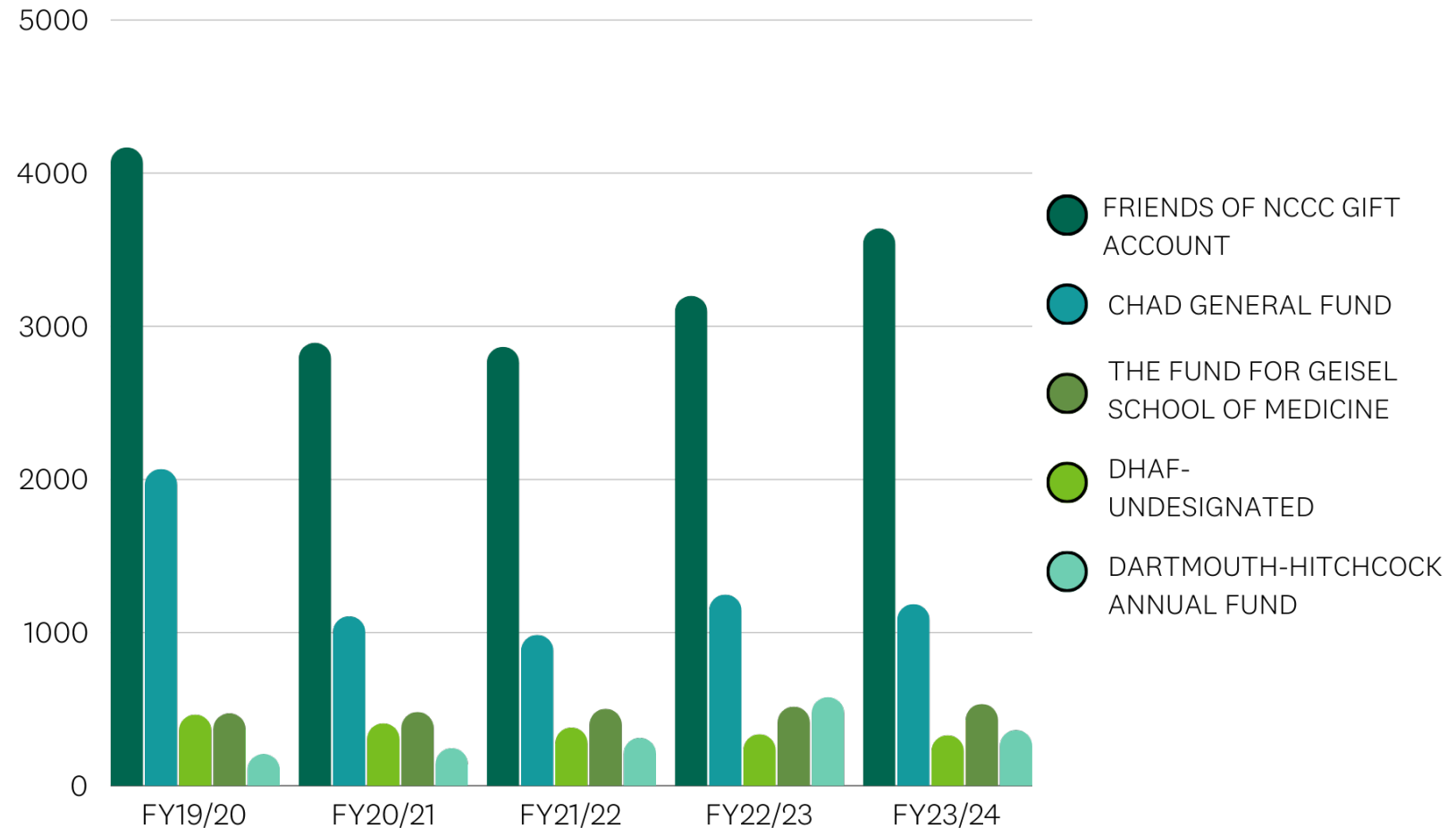
Lifetime giving

- **Definition:** Total dollars given over lifetime, arbitrary threshold (\$1M+)
- **Exclusion:** Smaller, consistent donors over a large one-time gift
- **MHA:** Recognize annual giving levels of \$1,000+ as well as a threshold of \$100K

Analysis

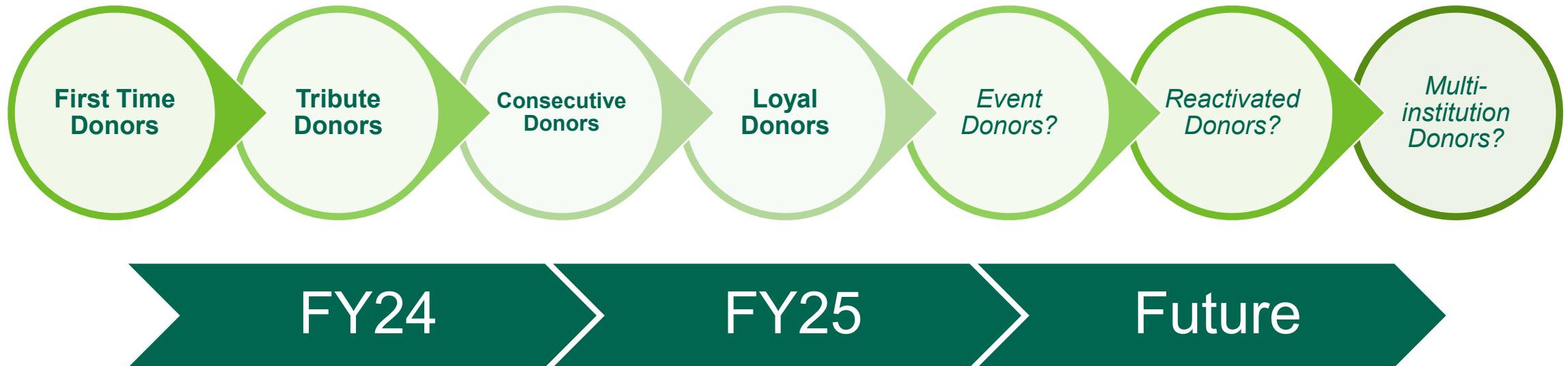
- Consecutive Donors come in through the Cancer Center and our Children's Hospital
- Outside of those two designations, consecutive donors are annual fund donors
- This represents the need to maintain donor identity with designation versus behavior
 - 'Cancer' versus 'Loyal'

Consecutive Donors - First Gift Designation



Foster Gratitude.
Instill Trust.
Show Impact.

Journey to the future of Behavior Based Stewardship



Key Takeaways

1. Data-analysis should be an iterative and replicable process to be reapplied to new data sets, priority audiences, campaigns
 - Data analysis can be explored in advance of, or jointly with development of new programs
 - Work within your existing data-structures, alongside data partners for highest rate of success
2. Be inclusive in data analysis, but also break down into smaller audiences for best story telling; Control data for extreme outliers
3. Engage with Stakeholders throughout and share behavior learnings at multiple points
4. Data-informed strategy will represent your stewardship work in a formal and executive fashion; friendly to a board or leadership group

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Questions?

Thank you for your time today!

