



#Altraining

STRATEGIES FOR
IMPROVING
DONOR
RETENTION



Lynne Wester | Donor Relations Guru | lynne@donorrelationsguru.com

ai ACADEMIC
IMPRESSIONS




LEARNING OUTCOME


After participating...


...you will be able to take a fresh approach to your solicitation cycle to enhance donor retention.

ai ACADEMIC
IMPRESSIONS 2


 AGENDA


- The Donor Attrition Story
- Understanding Donor Behavior
- Strategies for Increased Donor Retention
- Shifting the Culture from Dollars and Donors to Retention

 3

 POLL


**What is your first time
donor retention rate?**
(answers are anonymous)

 4



POLL

What is your current
overall donor retention
rate?



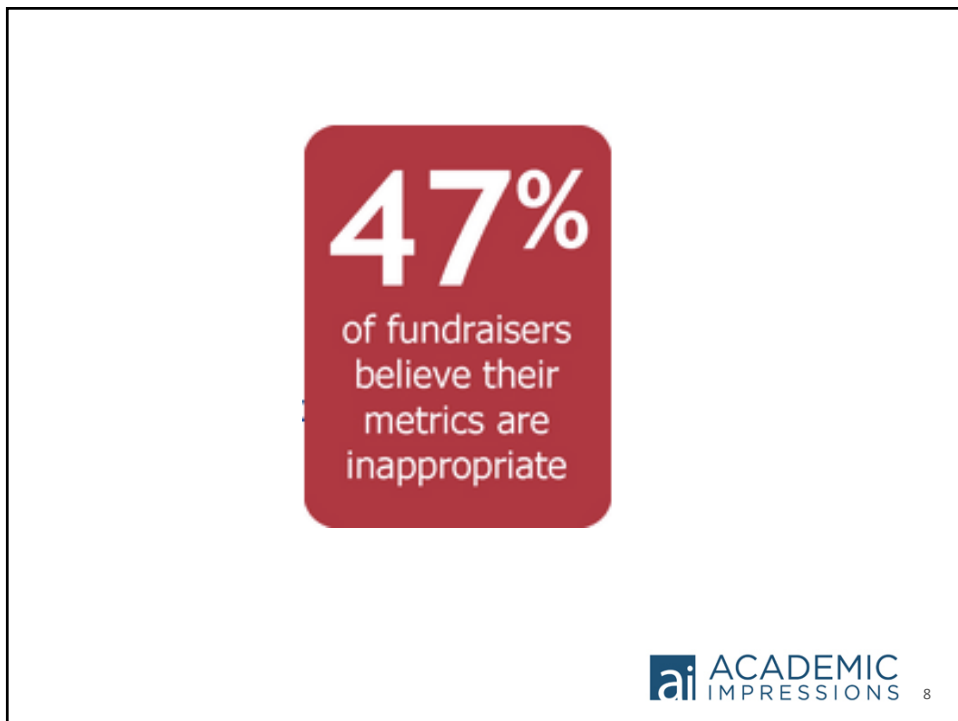
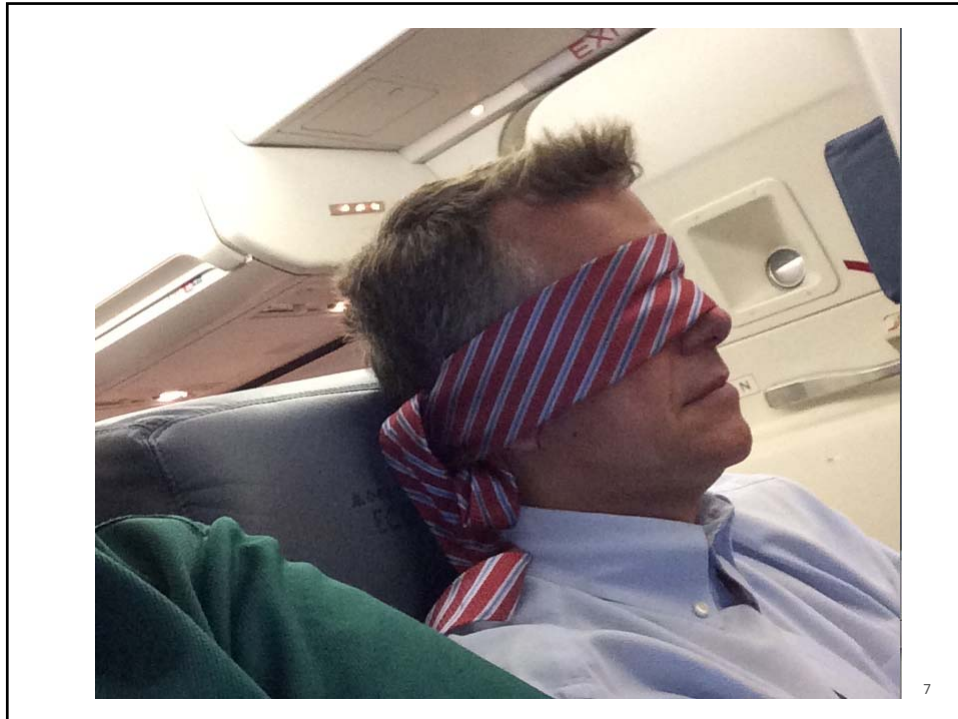
5

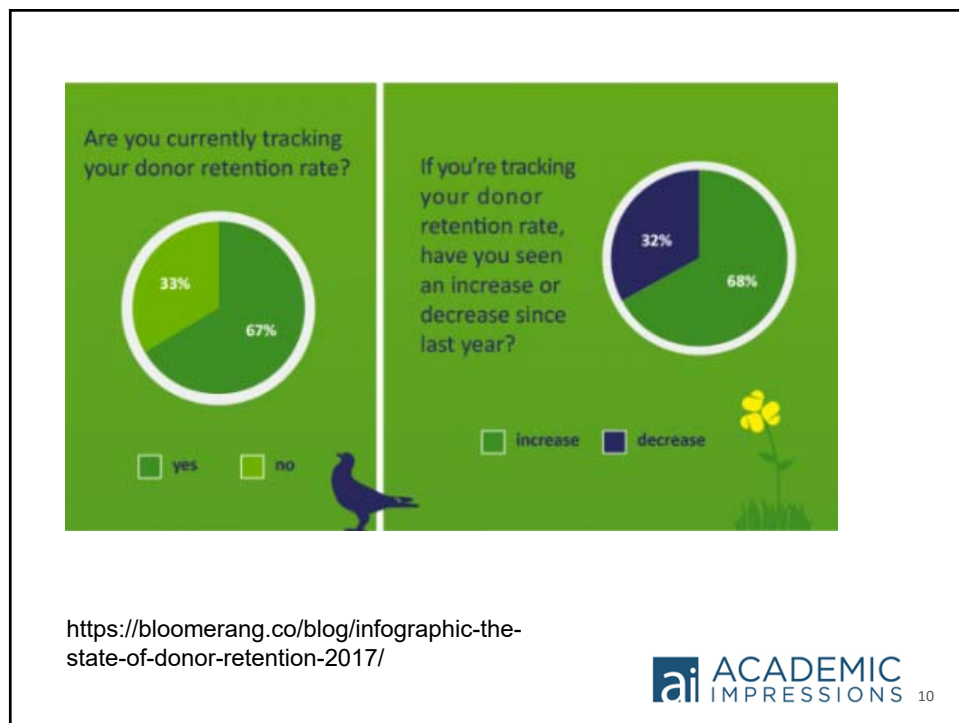
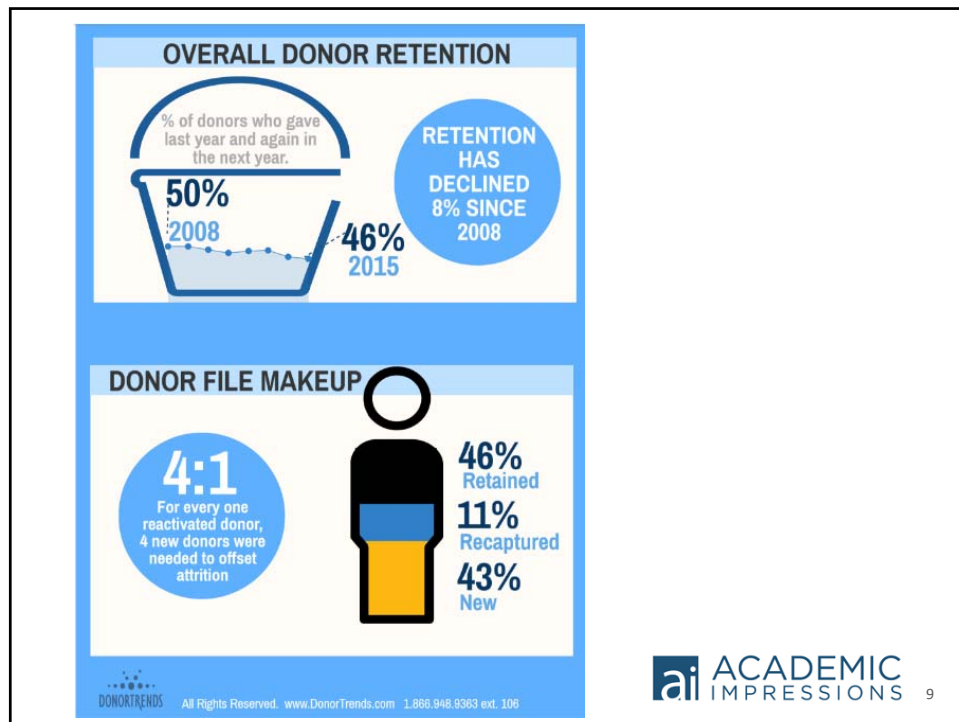
#Altraining

THE DONOR ATTRITION STORY



6

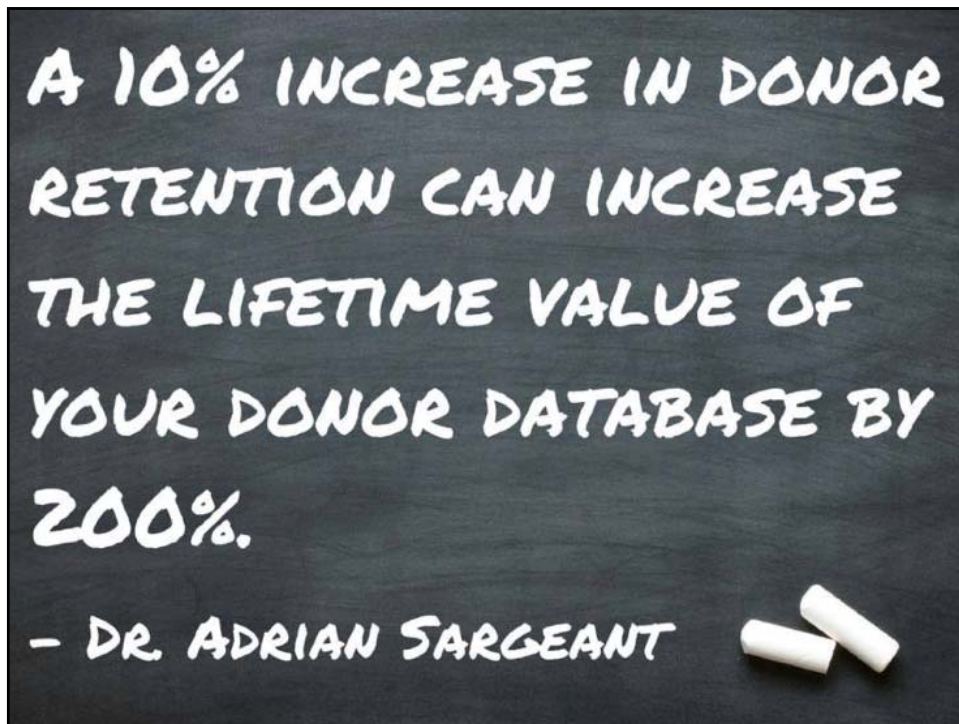






So what?

Donor Attrition Over Five Years						
# of Donors	Attrition Rate	Donors Remaining After 1 Year	Donors Remaining After 2 Years	Donors Remaining After 3 Years	Donors Remaining After 4 Years	Donors Remaining After 5 Years
1,000	20%	800	640	512	410	328
1,000	40%	600	360	216	130	78
1,000	60%	400	160	64	26	10

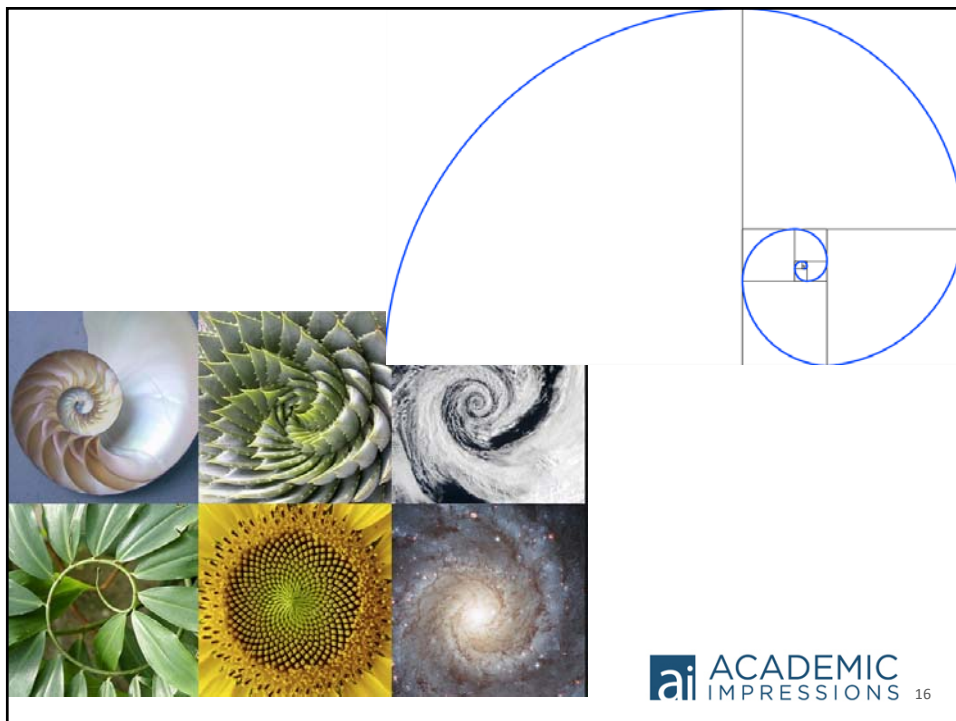




RESOURCE

Donor Retention Report

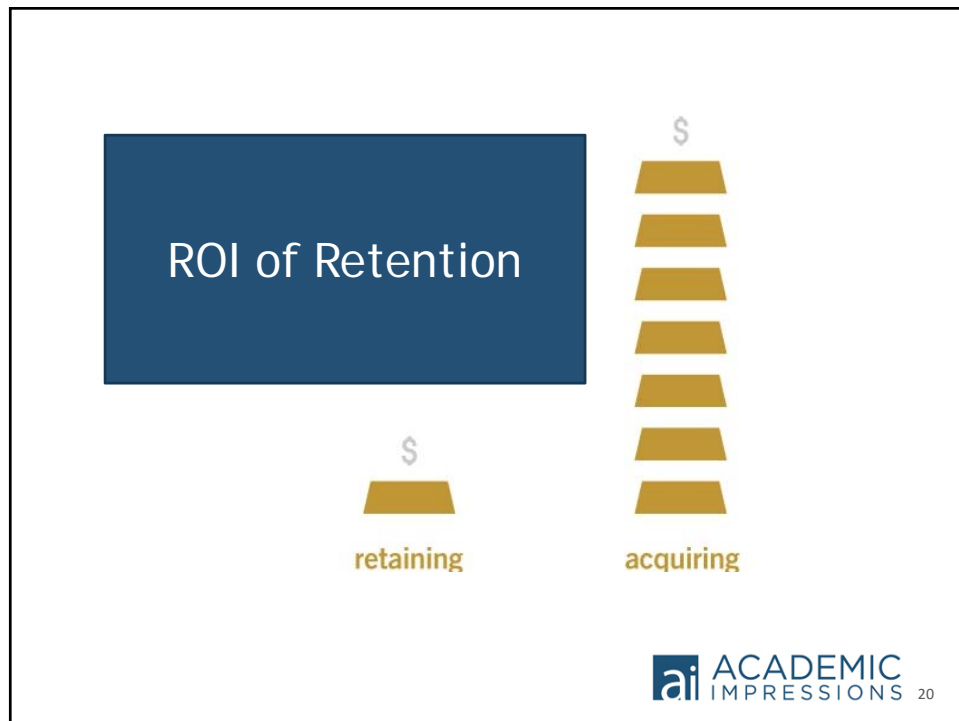
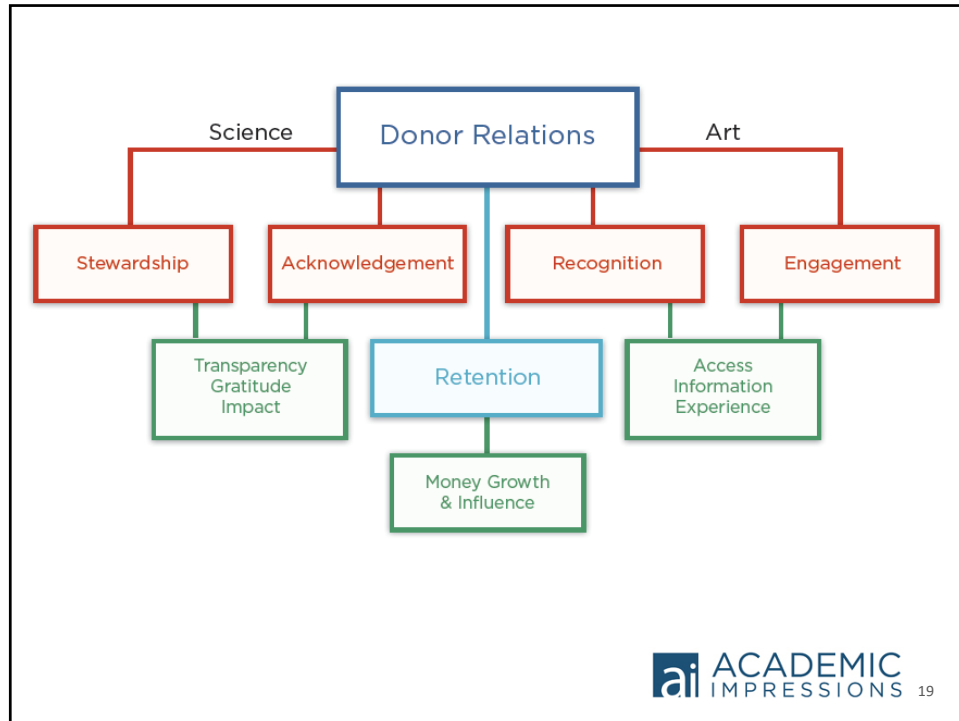
<http://datadriven.donortrends.com/retention-infographic-dte/>



■ TREAT BEHAVIOR
NOT TRANSACTIONS!

It's about the DONOR
not YOU.





#Altraining


UNDERSTANDING DONOR BEHAVIOR



LYBUNT AND SYBUNT DOESN'T CUT IT!


BEHAVIORAL REPORTING

1. Consecutive Donor Report
2. First-Time Donor Report
3. Donor Retention Report
4. Donor Giving Channel Report
5. Lapsed Donor Reacquire Report
6. Donor Increase Report

 23

USING STUDENT INFO

- Activities
- Residences
- Work Sites
- Affiliations

 24

WHAT WE THINK DONORS WANT



- Gifts
- Plaques
- Certificates
- Donor honor roll
- Fancy events

WHAT DONORS REALLY WANT

- Access
- Information
- Experiences



#Altraining

STRATEGIES FOR INCREASED DONOR RETENTION



A THANK IS A THANK

AND

AN ASK IS AN ASK.

AND

NEVER
THE TWO

SHALL MEET





RESOURCE												
Donor Relations Communication Calendar												
Audience	Communication Piece	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov
All Donors	Receipt Acknowledgment	X	X	X	X	X	X	X	X	X	X	X
All Online Donors	Receipt Acknowledgment	X	X	X	X	X	X	X	X	X	X	X
\$100+ Donors	Calendar year-end tax letter/ack.	X										
All constituents	Great Tuesday	X	X	X	X	X	X	X	X	X	X	X
First-Time Donors	Welcome postcard	X	X	X	X	X	X	X	X	X	X	X
Reacquired Lapsed Donors	Welcome back postcard	X	X	X	X	X	X	X	X	X	X	X
Loyalty Donors (2+ Years)	1890 Society Welcome	X	X	X	X	X	X	X	X	X	X	X
Alumni/Loyalty Donors (2+ Years) w/\$100+	Limited Edition George Magnet	X	X	X	X	X	X	X	X	X	X	X
\$1500+ Donors	President's Club Letter	X	X	X	X	X	X	X	X	X	X	X
CYD 25+	Weekly Presidential moves	X	X	X	X	X	X	X	X	X	X	X
\$500+ Designated Gift Donors	Thank yous from deans/directors	X	X	X	X	X	X	X	X	X	X	X

RESOURCE														
Perpetual donors	FY End Acknowledgment <i>(bridge w/giving infographic)</i>						X							Email
Perpetual donors	Monthly acknowledgment	X	X	X	X	X	X	X	X	X	X	X	X	Email
Faculty/Staff Donors	National Philanthropy Day postcard											X		Campus Mail
Faculty/Staff Donors	End of FY Thank You from President						X							Email
125% Increase Donors	125% increased Giving Postcard							X						Mail
Jay P. Graves Members	Welcome packet	X	X	X	X	X	X	X	X	X	X	X	X	Mail
Jay P. Graves Members	Report		X											Mail
Jay P. Graves Members	Seminars/Podcasts			X			X				X			Email
Jay P. Graves Members	Foundation phonathon			X										Phone
Day of Giving Donors	Tuition Freedom Day Postcards				X									Mail
All Donors	Impact Report				X									Mail/Email
Endowment Donors	Stewardship Reports											X		Mail

RESOURCE														
Donor Relations Communication Calendar														
Audience	Communication Piece	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	MOD
All Donors	Receipt Acknowledgment	X	X	X	X	X	X	X	X	X	X	X	X	Mail
All Online Donors	Receipt Acknowledgment	X	X	X	X	X	X	X	X	X	X	X	X	Email
\$100+ Donors	Calendar year end tax letter/ack.	X												Mail
All constituents	GratTuesday	X	X	X	X	X	X	X	X	X	X	X	X	Social Media
First-Time Donors	Welcome postcard	X	X	X	X	X	X	X	X	X	X	X	X	Mail
Reacquired Lapsed Donors	Welcome back postcard	X	X	X	X	X	X	X	X	X	X	X	X	Mail
Loyalty Donors (2+ Years)	1890 Society Welcome	X	X	X	X	X	X	X	X	X	X	X	X	Mail
Alumni Loyalty Donors (2+ Years) w/\$100+	Limited Edition George Magnet	X	X	X	X	X	X	X	X	X	X	X	X	Mail
\$1500+ Donors	President's Club Letter	X	X	X	X	X	X	X	X	X	X	X	X	Mail
CYD 25+	Weekly Presidential moves	X	X	X	X	X	X	X	X	X	X	X	X	Mail
\$500+ Designated Gift Donors	Thank yous from deans/directors	X	X	X	X	X	X	X	X	X	X	X	X	Mail



RESOURCE

Analyzing Retention Data

■ WE NEED: MORE IMAGINATIVE COMMUNICATIONS

All we need to do is to write
brilliantly, package it superbly,
and to present it in a way that
will captivate, thrill and inspire.

I sincerely want to thank you for your support. Your monthly giving provides us with a consistent, reliable funding stream, and that's precisely what this work demands: consistent, reliable efforts. This is not about one-off heroics; it's about creating conditions that empower local people to continue working each day to keep water flowing.

THANK YOU LYNNE!

YOU'VE JUST CHANGED LIVES.

This is Helen Apio. She used to walk a mile and a half to a neighboring village to get water. The walk was long, and the wait was even longer once she got there. Helen's village didn't have a well.

When she brought the water home, she'd say to herself, "How should I use this water today? Should I water my garden so we can grow food? Should I wash my kids' uniforms? Should I use it to cook? Should we drink this water?" With two children, one husband and 10 gallons, Helen never had enough water.

We saw the shame in her eyes when she described how her two kids were often sent home from school because their uniforms were dirty.

But a few years ago, people did exactly what you did today -- they donated. And because of those donations, Helen's village got a well. Now, Helen has all the water she needs.





UGANDA

will the beautiful women of the world please stand up.

This is when I met Helen Apio. Placing both hands on my shoulders and smiling, she said, "Now, I am beautiful." That really hit me. My job is to focus on sustainable development, health, hygiene and sanitation; to make sure charity water's projects are working in 20 years. But nowhere on any of my surveys or evaluations was a place to write, "Today we made someone feel beautiful."




[READ THE STORY >](#)

"I am happy now," Helen beamed. "I have time to eat, my children can go to school. And I can even work in my garden, take a shower and then come back for more water if I want! I am bathing so well."


A few of the men chuckled to hear a woman talk about bathing. But all I noticed was Helen's glowing face, the fresh flowers in her hair, and the lovely green dress she wore for special occasions. Touching her forearm, I replied, "Well, you look great."

"Yes," she paused. Placing both hands on my shoulders and smiling, she said, "Now, I am beautiful."

REPORT IMPACT







0
0
0




AYDER AWLIAT ELEMENTARY SCHOOL

Completed: July 2011 [?](#)







COUNTRY [?](#)
ETHIOPIA



PEOPLE SERVED [?](#)
185

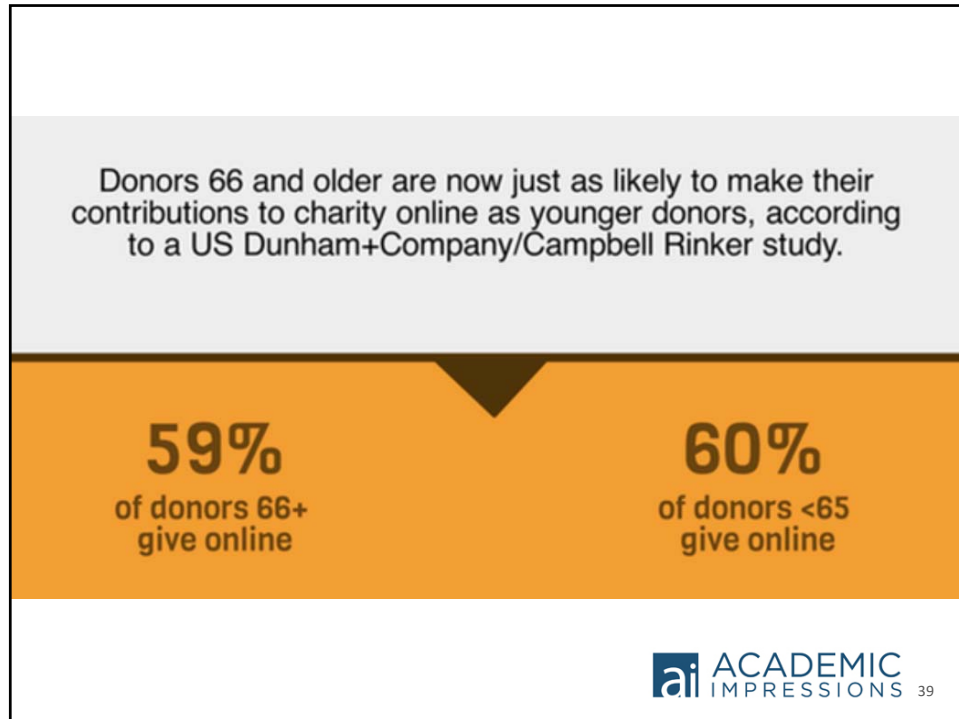


PROJECT TYPE [?](#)
DRILLED WELL




[Download full resolution photos](#)

- **Region:** Tigray [?](#)
- **GPS:** 12.717489, 39.326386 [?](#)
- **Project Cost:** \$7,326.00 [?](#)



Customer Receipt/Purchase Confirmation

 **Business Office**
To: Lynne Wester <lynnewester@hotmail.com>; ✕

[Reply](#) | ▼ Wed 12/3/2014 12:55 PM

GiftReceipts

Thank you for your order!

Order Information

Merchant: [REDACTED]

Billing Information

Lynne Wester
808 hawthorne lane
charlotte, NC 28204
US
lynnewester@hotmail.com

Shipping Information


Total: US \$25.00

MasterCard

Date/Time: 3-Dec-2014 5:55:38 MST
Transaction ID: 6721413324

ai ACADEMIC IMPRESSIONS 40



 **CHAT**

Which of these do you think you could implement?


What other ideas do you have, or have you tried?

ai ACADEMIC IMPRESSIONS 42

#Altraining

SHIFTING THE CULTURE FROM DOLLARS AND DONORS TO RETENTION





the Y

YMCA OF GREATER CHARLOTTE
500 East Morehead Street, Suite 300
Charlotte, NC 28202

Throughout our lives we experience many firsts that shape who we are and will become. Your first gift to the YMCA of Greater Charlotte is no different. Your generosity is shaping the lives of kids, families and adults in need across our community.

Together, with your generous support, we are ...


- driving academic achievement and inspiring kids to reach their greatest potential;
- tackling our community's greatest health challenges and improving quality of life;
- and ensuring access and inclusion so that everyone has a chance to succeed and belong.

Thank you for your first gift to the Y. We're proud to welcome you to our family of donors, and we look forward to strengthening community together for many years to come.


Visit ymcacharlotte.org/somuchmore to see more real stories of how your gift is making a difference.

The Y. So Much More™

YMCA Mission: To put Christian principles into practice through programs that build healthy spirit, mind and body for all.

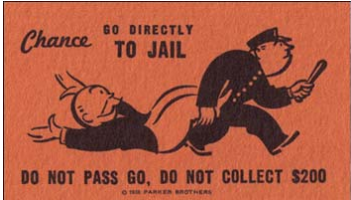



ai ACADEMIC IMPRESSIONS 45



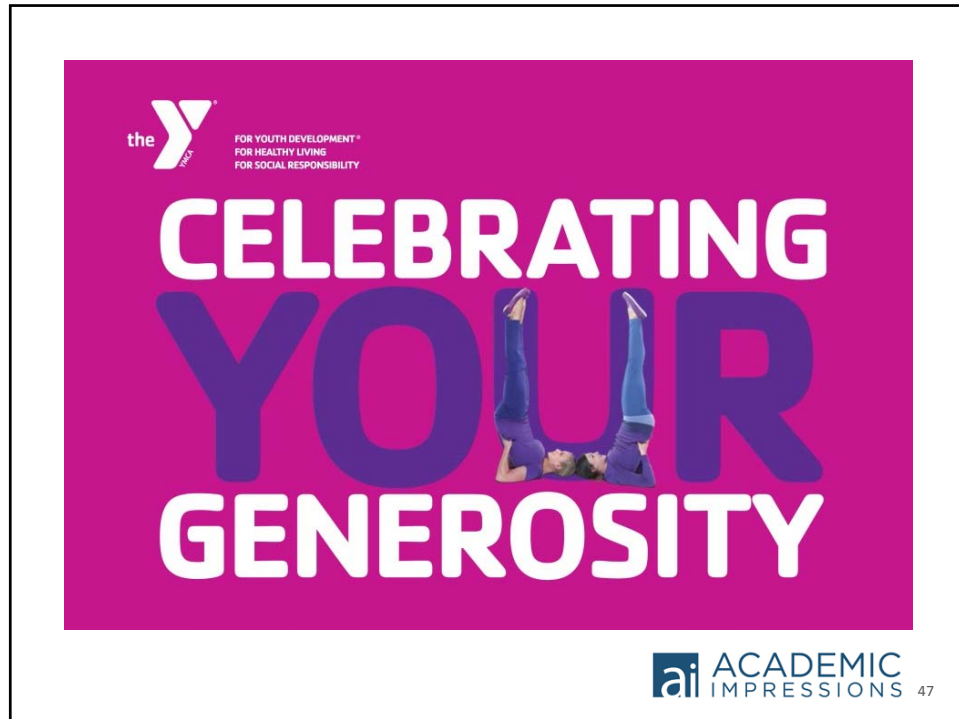
FIRST TIME DONOR JOURNEY

- <30 Days - Postcard or Email
- <3 Months- Phone call from Volunteer
- <6 Months- Hand Written Note
- <11 Months Impact Report
- THEN and Only Then...





ai ACADEMIC IMPRESSIONS 46



Next month marks one year since your first charitable gift to the YMCA of Greater Charlotte!

Can you believe it's been almost a year since you joined our family of Y donors? Neither can we – time flies when your generosity is making a difference! Thank you so much.



Over the past year, because of donors like you, we've been inspiring young potential, improving quality of life for people facing significant health challenges and providing everyone with a place to belong at the Y.

Yet there is so much more to do. We have an extraordinary opportunity to serve even more people in need across our community; but only your continued support will make it possible.



Please consider renewing your gift to the YMCA Annual Campaign by giving online today at ymcacharlotte.org/donate.

Every gift matters, especially yours.
Together, we can achieve so much more.

The Y So Much More™
YMCA Mission: To put Christian principles into practice through programs that build healthy spirit, mind and body for all.

YMCA OF GREATER CHARLOTTE
500 East Morehead Street, Suite 300
Charlotte, NC 28202



ai ACADEMIC IMPRESSIONS 48

First-time donors who
get a personal thank you
within 48 hours are 4x
more likely to give a
second gift.

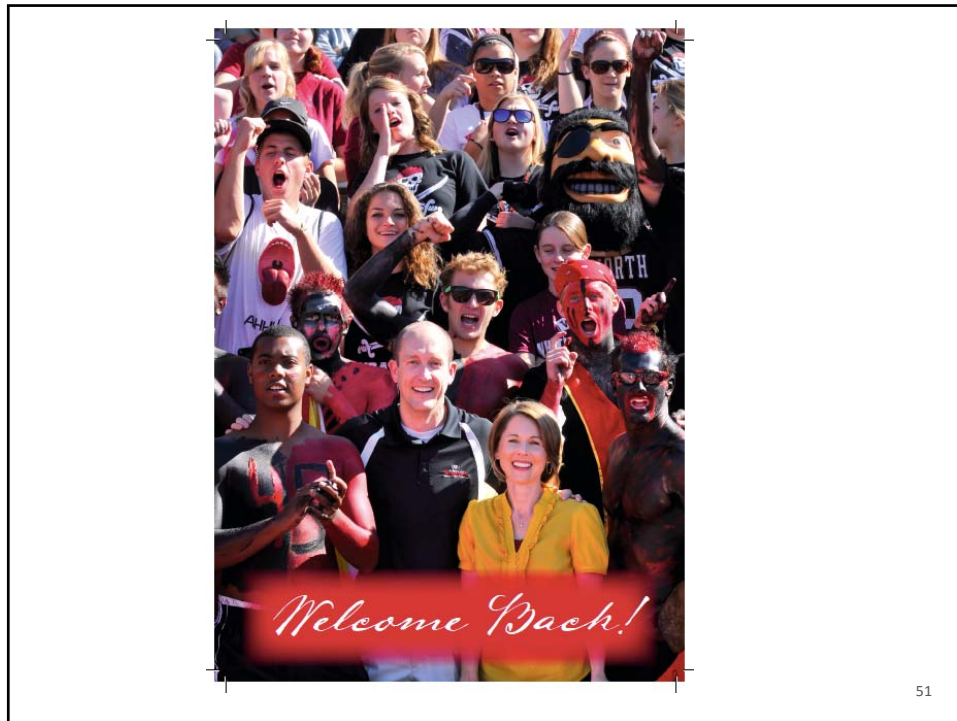
Tom Ahern


RESULTS



22%

\$234,785





Welcome Back!

We're so happy you're back! We count on each member of the Whitworth family to increase our ability to provide the best education and experience possible for our current students. We understand there are a lot of great organizations deserving of your philanthropic support, but your gift to Whitworth means the world to us. Thank you for joining us in our mission as we educate tomorrow's leaders!

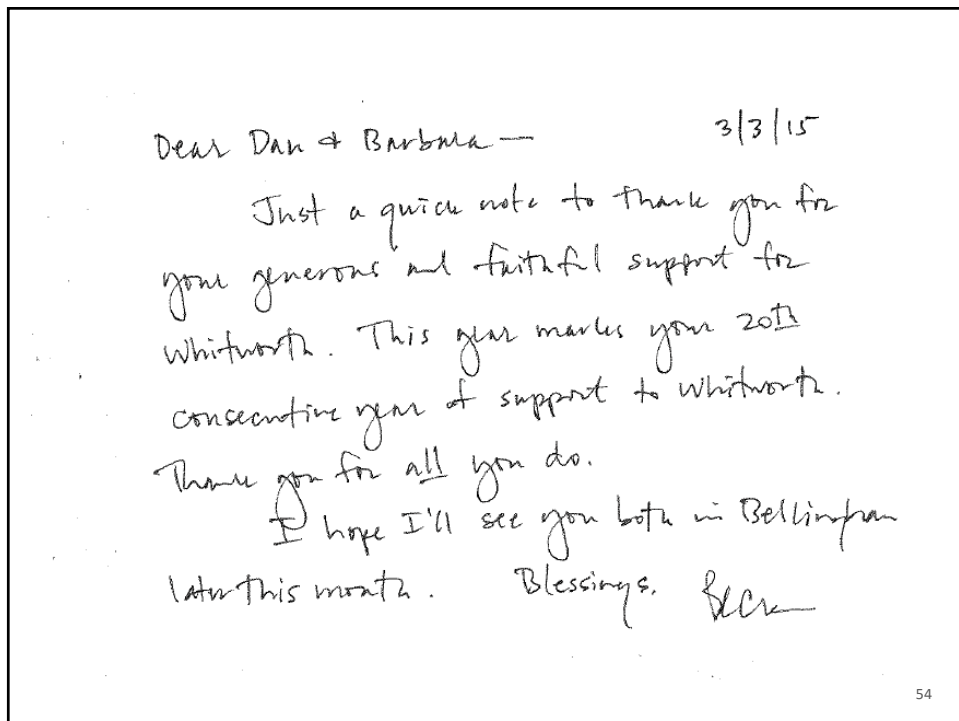
To see how your gifts change students' lives, visit www.whitworth.edu/impact.

CELEBRATE
WHITWORTH 125 YEARS

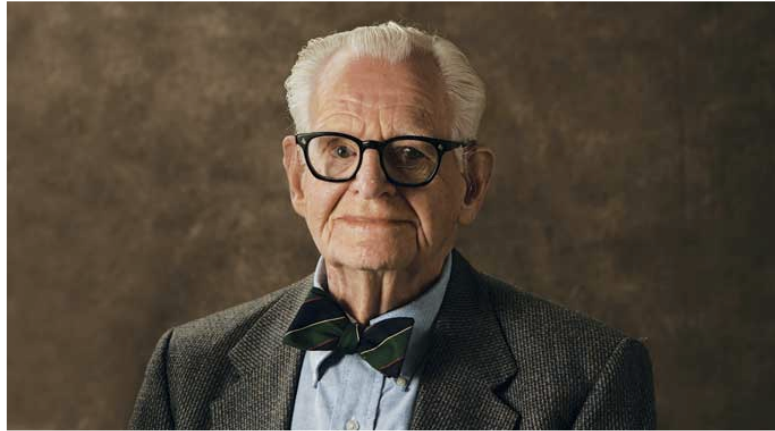
Whitworth University
300 W. Hawthorne Rd
Spokane, WA 99251

Non-Profit Org.
U.S. Postage
PAID
Spokane, WA
Permit #387

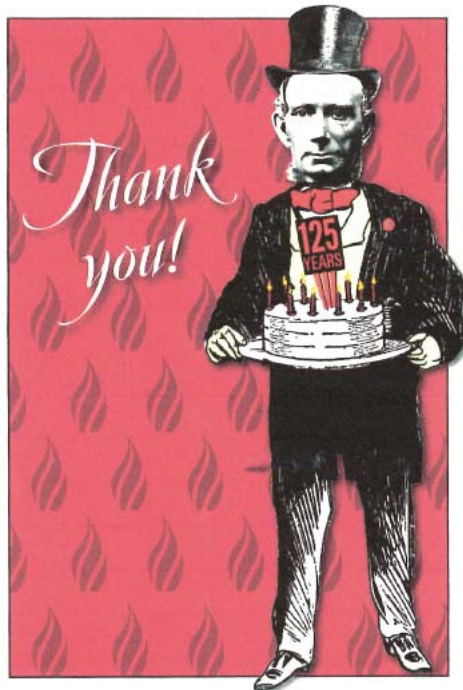
ai **ACADEMIC**
IMPRESSIONS 52



The Harold C. Ripley '29 Society

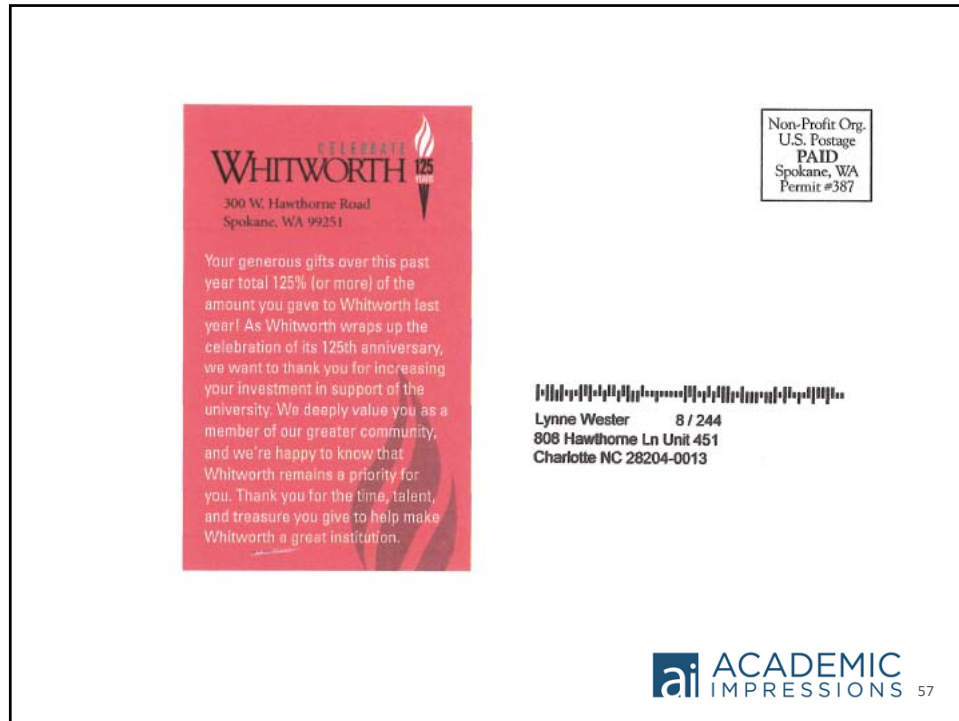


ai ACADEMIC
IMPRESSIONS 55



56

Strategies for Improving Donor Retention



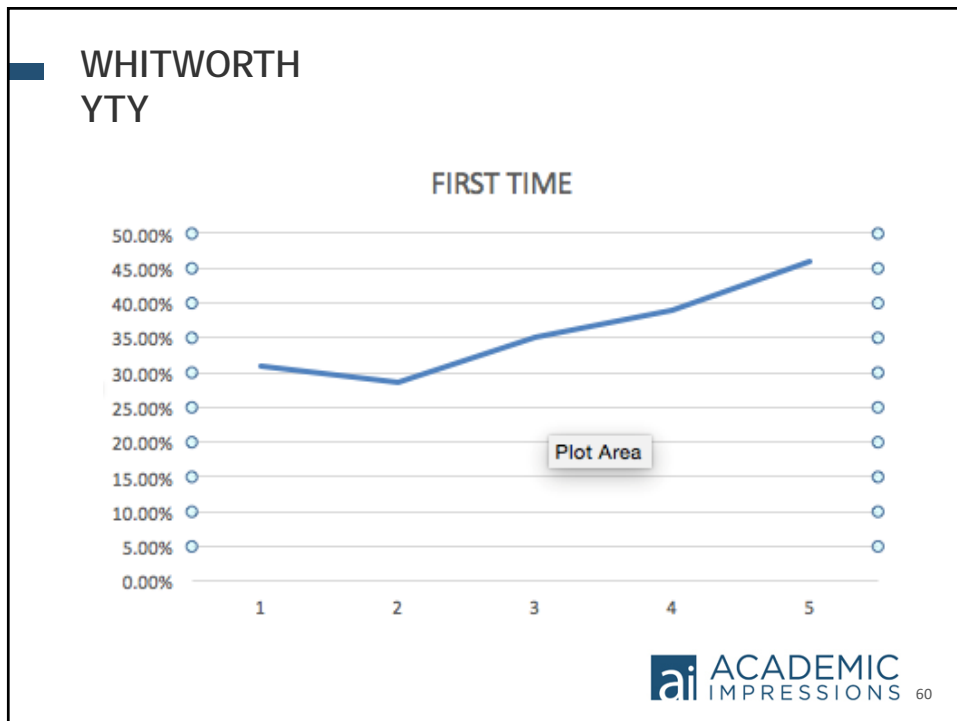
I'M KATHRYN.

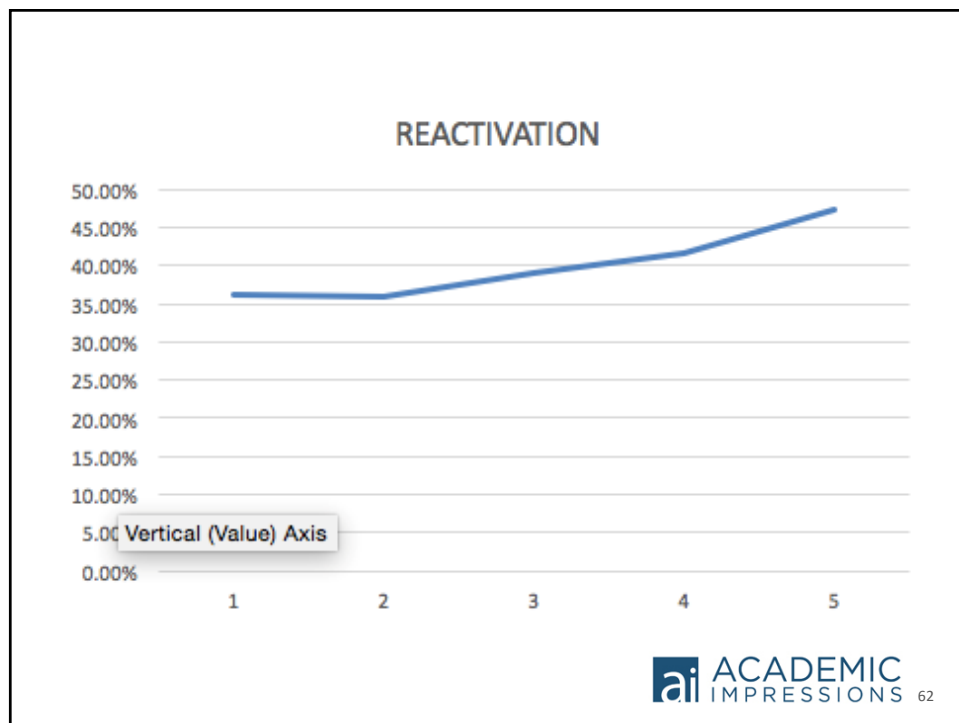
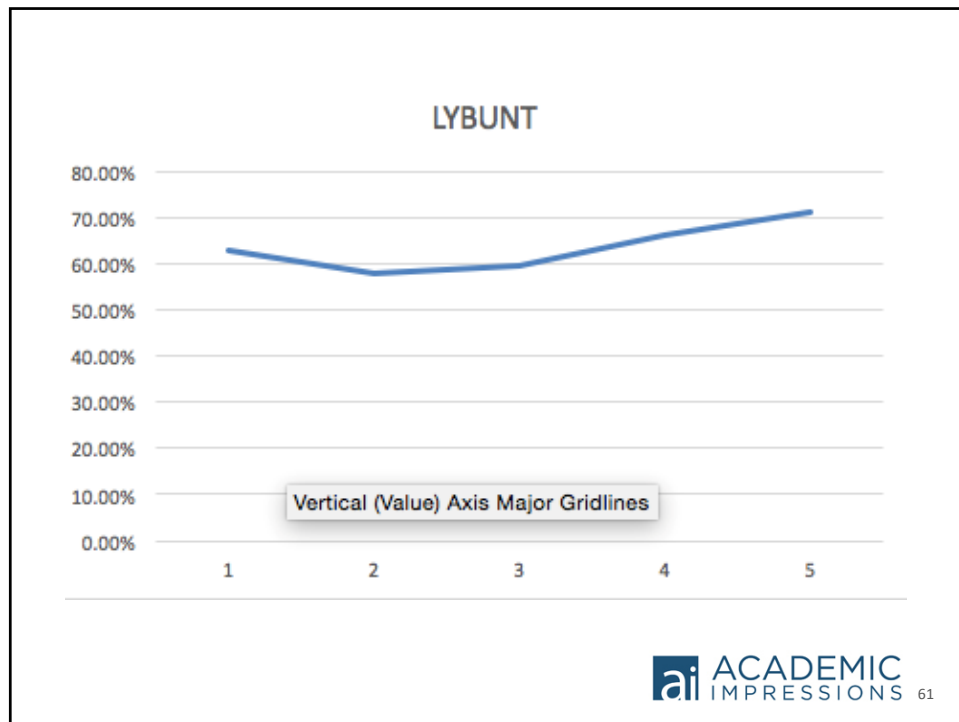
POW!

My experience at Whitworth has been nothing short of Overwhelming, demanding, & strenuous. It has also been a time of Incredible growth for me Relationally, academically, & Spiritually. THANK YOU!

Kathryn Hendricks | Mercer Island, Wash. | Communications | Freshman
www.whitworth.edu/kathryn

59





HOW MUCH IS IT WORTH?

Retained Donor Worth 2015	
\$	890,817.49

Not like this....



1



2



3



4

Like this!



1



2



3



4



5



TAKEAWAYS

- Know Your Numbers
- Start with One Behavior
- Get Creative
- Prioritize
- Don't Let Analysis Paralysis Stop You
- Measure Outcomes



QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

© Copyright 2017 Academic Impressions

Follow us:



67