Yes.  The End.  Oh, how, you ask?

*"Will he be talking with slides the whole time?"*

*- person concerned they went to wrong presentation*

# You're in the wrong place if you're here for...

1. The Long Game of Volunteerism – Christina Mariscal Pasten

2. 5 Ways to Optimize Your Donation Page for Year End – Yanni Saratsis

3. **Line Dancing Lessons** - sponsored by Charity Ace (you're late)

Raise®
2023

Raise® 2023

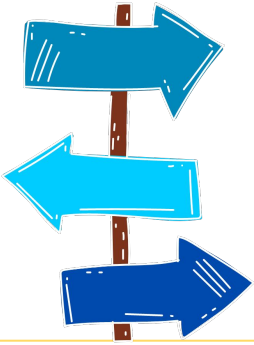*"Are we going somewhere here?"*

\- morning person

Houston, we have a problem.

*Lapsed donors HURT.*

BIG IDEA:

Lapsed donors don't have to be painful!

# Agenda

1. Why Lapsing?

2. Can We Curb Lapsing?

3. How Can We Win More Back?

4. **Where do I start?!**

5. Let's Stay Friends

**Ms. Harlow**

Why do donors lapse?

Raise® 2023

"It's all your fault!"

-  bad friend

Raise® 2023

"*Not really ALL my fault.*"

*- sound mind*

# Lapsed Donor Overview

- 40% responded that they do not give money to charity because they do not have the financial resources.
- 22% **volunteer in lieu of donating** money.
- 17% **donate food or goods in lieu of donating** money.
- 12% **don't trust organizations** to spend their money well.
- 7% **prefer to spend their money on** their family and friends.
- 2% **don't believe** that organizations make a **positive difference**

20%

Source: NPTech For Good
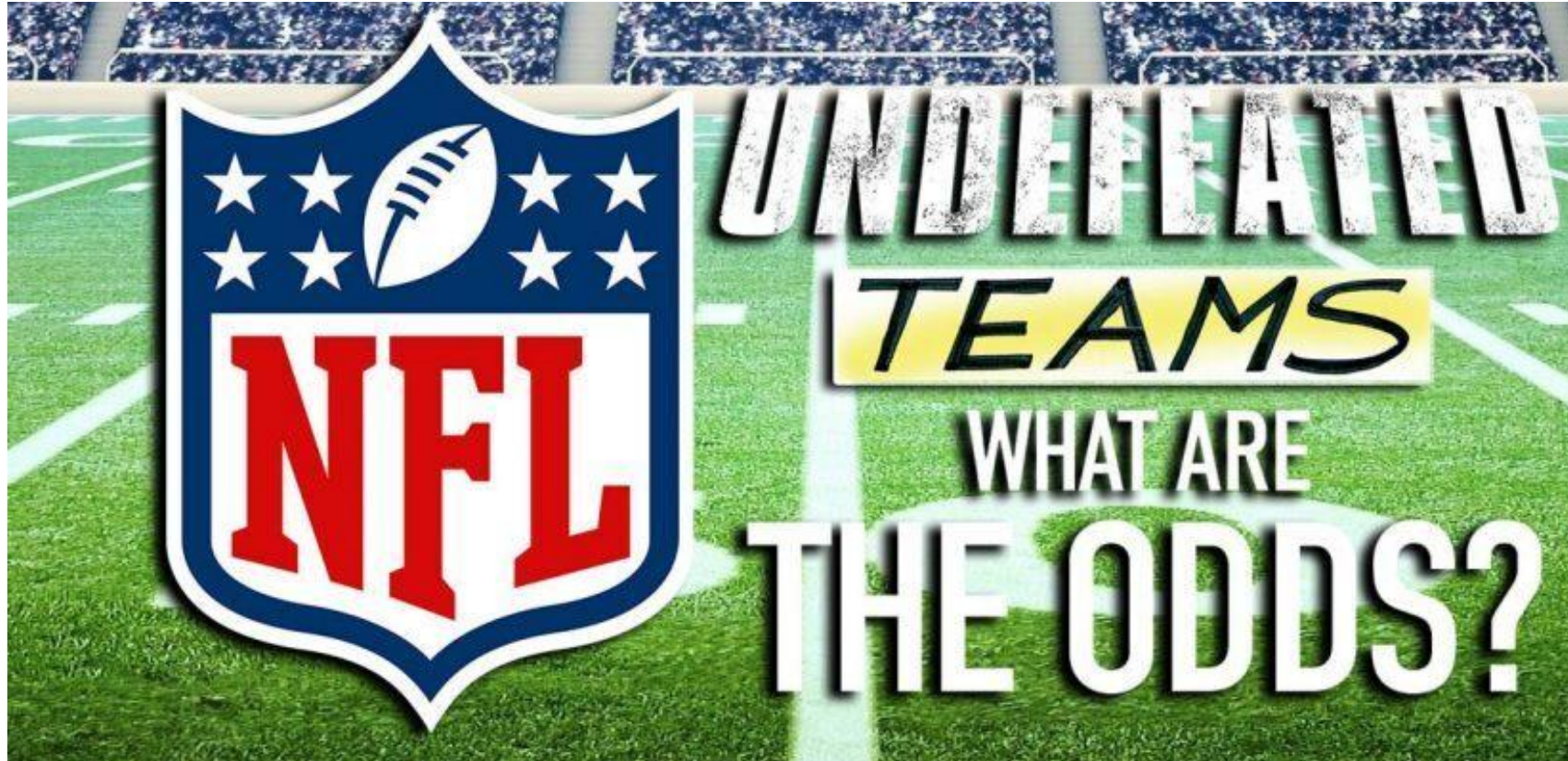
# Lapsed Donor Overview

1. Give Local
2. Saving Money
3. Donation Too Small To Make Difference
4. **Unsolvable Problem**
5. **Misunderstanding Problem**
6. **Where Does My Dollar Go?**
7. **Shouldn't Government Solve This?**
8. **Enabling**

Source: The Life You Can Save
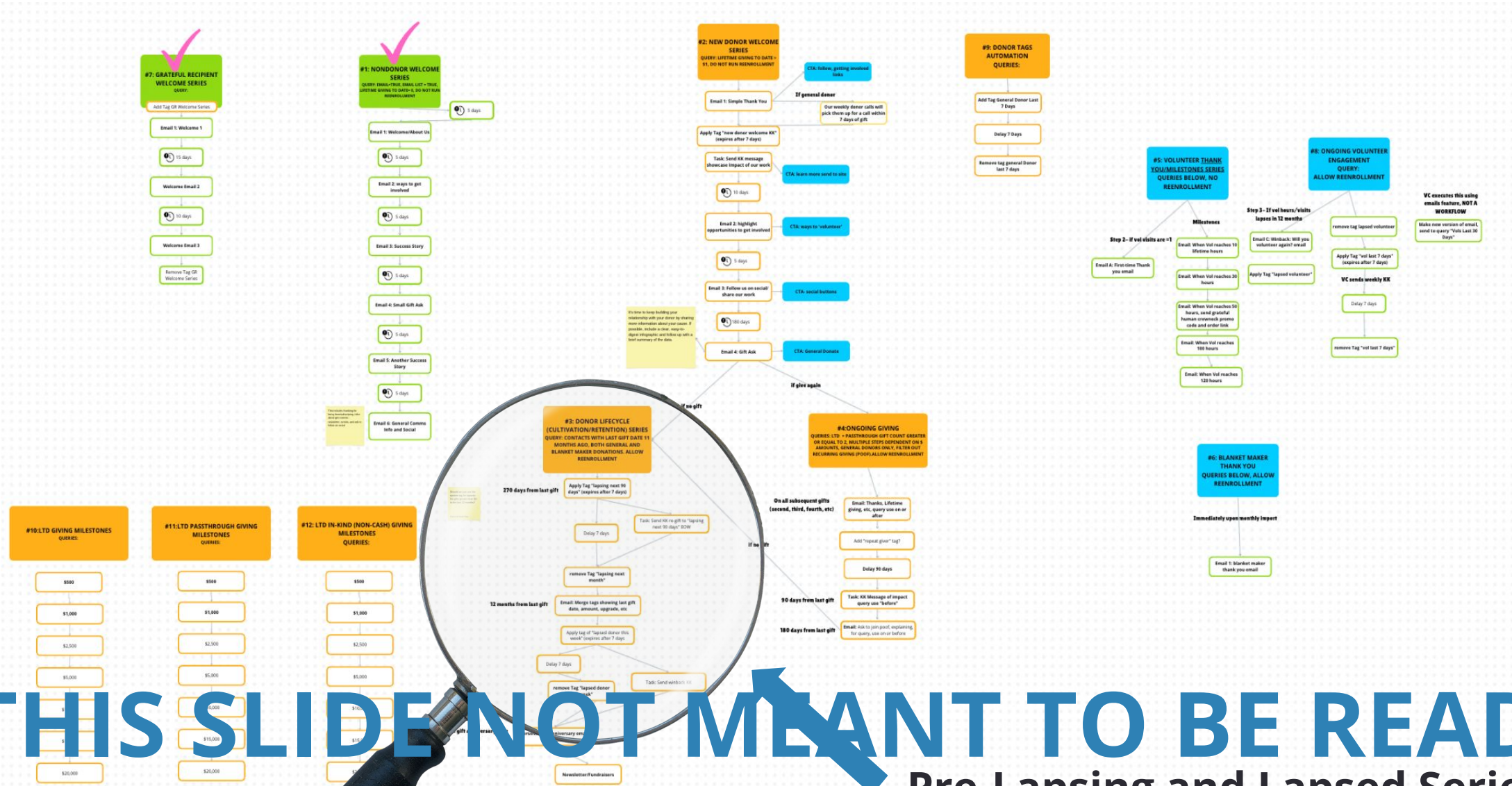
# Can we curb lapsing?

THIS SLIDE NOT MEANT TO BE READ!
Pre-Lapsing and Lapsed Series

# #3: DONOR RETENTION
# ALLOW REENROLLMENT

## STEP 1: Lapsing Next 90

### Query: 270 Day Lapse Query
- Last Gift Date= on or before= 270 days ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: Lapsing in 90 days

Task: Send KK lapsing next 90

**Delay: 7 Days**

Remove tag: Lapsing Next 90

Add tag: Lapsing 270-365

**Delay: 94 Days**

Remove tag: Lapsing 270-365

## STEP 2: Lapsed Donor- 1 Year

### Query: One Year Lapsed Donor
- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: FTY Lapsed Donor

Add tag: 1 Year Lapsed Donor Date

Email 1: New Donor Welcome 1

**Delay: 30 Days**

Task: Send 1 Year Lapsed KK

**Delay: 335 Days**

Remove tag: 1 Year Lapsed Donor Date

## STEP 3: Lapsed Donor- 2+ Year

### Query: 2+ Year Lapsed Donor
- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: 2+ Year Lapsed Donor Date

Email 1: Retention workflow email post 24+ months

**Delay: 365 Days**

## STEP 4: Retained Donor

### Filter:
- Tag= any of = Is any of 1 Year Lapsed Donor Date,2+ Year Lapsed Donor Date,Lapsing in 90 Days,Lapsing between 270-364 days
- YEAR TO DATE PLUS PASSTHROUGH GIVING= Greater than or equal to 1

Remove tag: 2+ Year Lapsed Donor Date

Remove tag: 1 Year Lapsed Donor Date

Remove tag: Lapsing between 270-364

Remove tag: Lapsing in 90

Remove tag: FTY Lapsed Donor

## STEP 1: Lapsing Next 90

**Query: 270 Day Lapse Query**

- Last Gift Date= on or before= 270 days ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: Lapsing in 90 days

Task: Send KK lapsing next 90

**Delay: 7 Days**

Remove tag: Lapsing Next 90

Add tag: Lapsing 270-365

**Delay: 64 Days**

Email: Anniversary is coming up next month!

**Delay: 30 Days**

Remove tag: Lapsing 270-365

# Can we win more back?

**STEP 2: Lapsed Donor- 1 Year**

**Query: One Year Lapsed Donor**
- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: FTY Lapsed Donor

Add tag: 1 Year Lapsed Donor Date

Email: Happy Anniversary!

**Delay: 14 Days**

Task: Send 1 Year Lapsed KK

**Delay: 14 Days**

Email: Sorry we missed you!

**Delay: 335 Days**

Remove tag: 1 Year Lapsed Donor Date

**Most Common Miss**

**Win-back Campaign**

**STEP 3: Lapsed Donor- 2+ Year**

**Query: 2+ Year Lapsed Donor**

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: 2+ Year Lapsed Donor Date

Email 1: Retention workflow email post 24+ months

**Delay: 365 Days**

# Future Journeys

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## #4: ONGOING GIVING
### ALLOW REENROLLMENT

### STEP 1: 180 Day Engagement

Query: 180 Day Engagement query
- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or before = 180 days ago
- Last Gift Date = on or after = 270 days ago
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Add tag: 180 Day Repeat Gift

Email 1: Send 'Recurring Gift Ask (#4: Ongoing Giving)' email

Delay: 7 Days

Remove tag: 180 Day Repeat Gift

Delay: 83 Days

### STEP 2: 90 Day Engagement

Query: 90 Day Engagement query
- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or before = 90 days ago
- Last Gift Date = on or after = 180 days ago
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Add tag: 90 Day Repeat Gift

Task: Send 90 repeat gift kk update

Delay: 7 Days

Remove tag: 90 Day Repeat Gift

Delay: 84 Days

### STEP 3: Repeat Git Made

Query: Ongoing Giving Gift Count >=2
- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or after = 30 days ago
- Last Gift Date = on or before = today
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Append Wealth Contact Data

Add tag: Repeat Giver

Email 1: Send 'Ongoing Giver Engagement (General Donors Call Workflow) (NEW_Repeat Giver Engagement)'

If general donor, workflow #X picks them up for general donor last 7 days weekly board calls

Delay: 30 Days

**Benchmarking - Is This Working?**

# Benchmarking- Is This Working?

1. Report: Life-to-Date Giving and # of donors

2. Divide LTD Giving/#of donors

3. Establish Benchmark LTV and track over time

   (quarterly, semiannually, annually, etc.)

"*Where do I start?*"

\-  same breath

# Where to Start: **Donor Journeys**

1.  **List every place or moment you have an interaction with a contact.**

    - Email/Mobile Newsletter Signup
    - Event Registration
    - Volunteer Signup, etc.

2.  **From each point of interaction, map out a series of communications.**

3.  **Identify areas of overlap and query accordingly.**

4.  **Strategically insert the places you want to " make an ask."**

5.  **Launch ONE at a time!**

# TLDR: **Lapsed Donors**

1.  Make your donor journey intentional.

2.  Specifically map out pre-lapsing phase.

3.   Diversify with omni channel communication and see what "sticks."

4.  Start with larger segments and get more granular over time.

- All lapsed gifts
- Lapsed by dollar amount
- Lapsed by campaign

# TLDR: Is It Working?

1.  Report: Life-to-Date Giving and # of donors

2.  Divide LTD Giving/#of donors
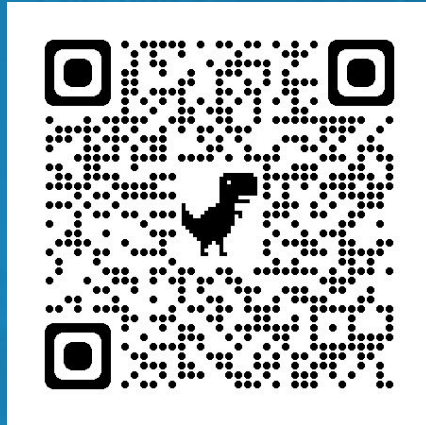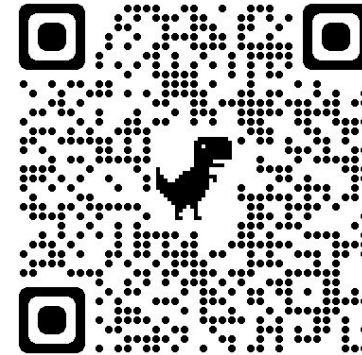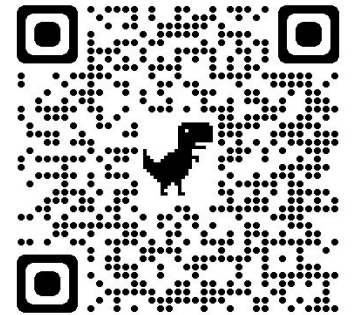
3.  Establish Benchmark LTV and track over time

BIG IDEA:

Lapsed donors don't have to be painful!

# Follow Us on Social!

fb.com/onecause

@onecauseteam

@onecauseteam

linkedin.com/company/onecause