

Inspire. Connect. Grow.
2019 | CHICAGO, IL

#2019Raise

Raise 2020

WE'RE GOING VIRTUAL

2 Days of Online Learning & Networking

SEPTEMBER 14-15, 2020

WELCOME

Steven Shattuck

Chief Engagement Officer, bloomerang

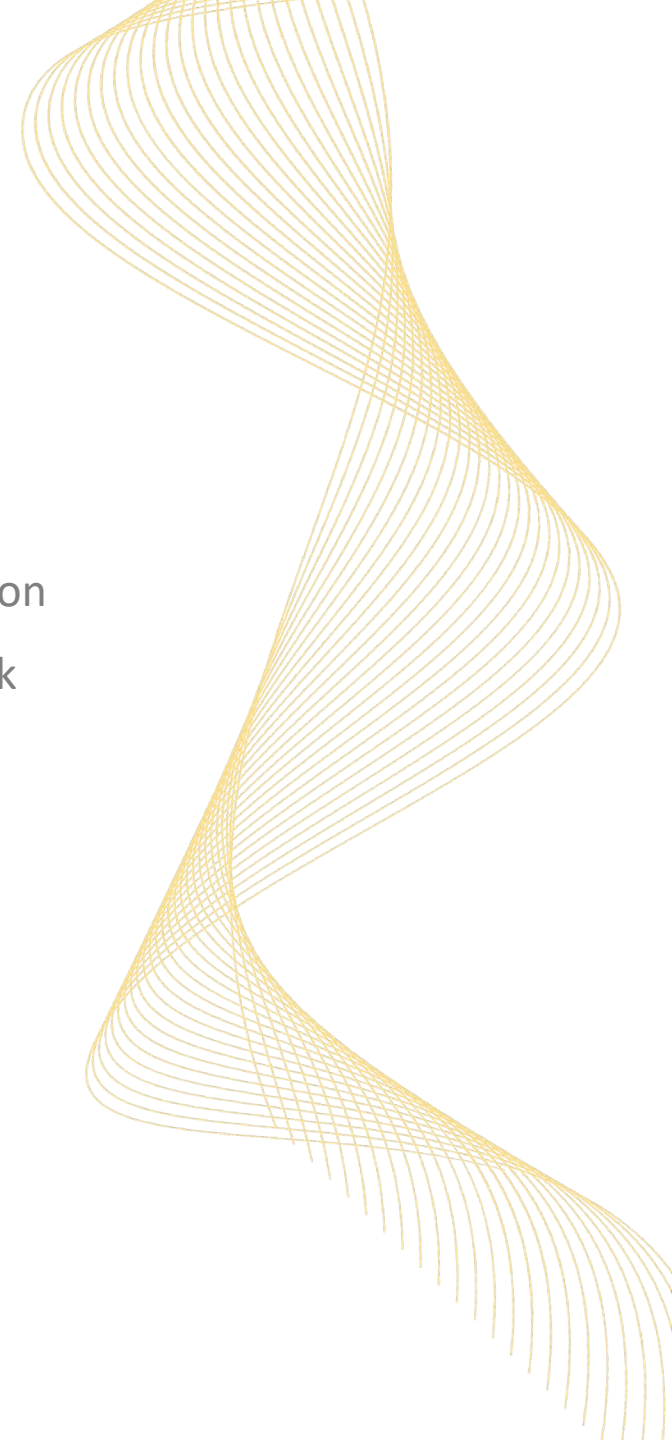
Author: Robots Make Bad Fundraisers (forthcoming)

Contributor: Fundraising Principles and Practice: Second Edition

Member: Fundraising Effectiveness Project (FEP) Project Work Group, AFP Center for Fundraising Innovation (CFI), Study Fundraising Steering Group at the Hartsook Centre for Sustainable Philanthropy at Plymouth University

Fun facts:

- 1st job: producing fundraising videos
- Prefer tea to coffee
- Allergic to rhubarb
- Won the David Letterman scholarship



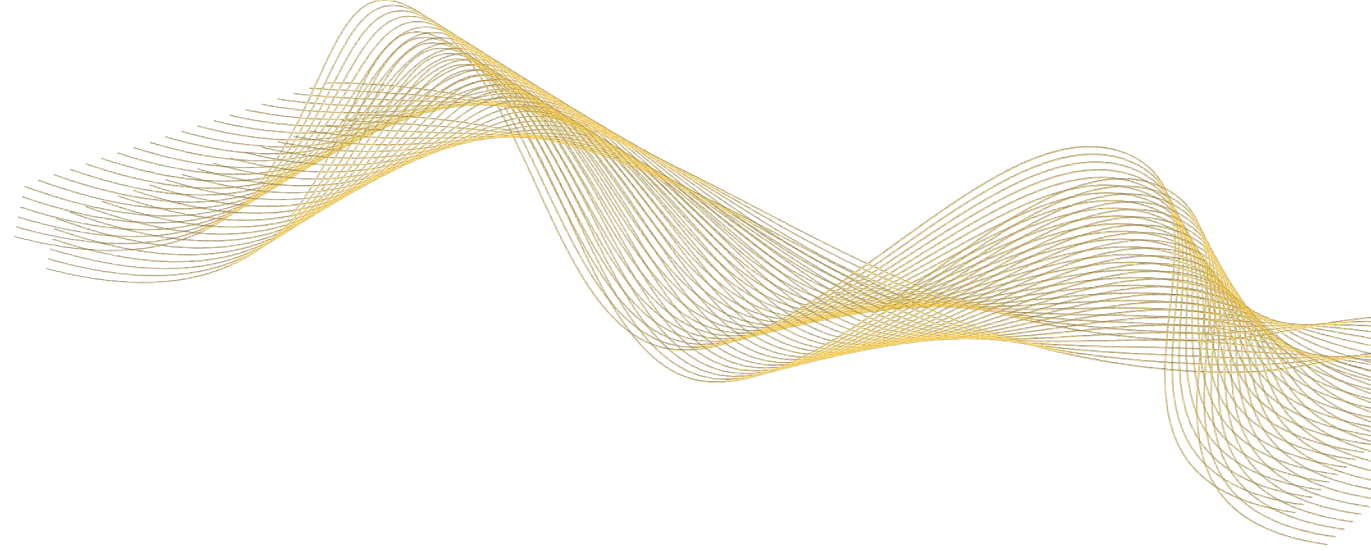


Raise
2020

Great Things From Small Beginnings:

A Guide to Retaining First-time Donors

Agenda



1. First line item
2. Second line item
3. Third line item
4. Bonus Section
5. Closing

Why focus on first-time donors?

“According to the ancient Chinese proverb, a journey of a thousand miles must begin with a single step.”
- John F. Kennedy

The current state of donor retention:



<http://afpfep.org>

Donor Retention

AVERAGE

45.1%



FIRST-TIME

20.3%



REPEAT

61.3%



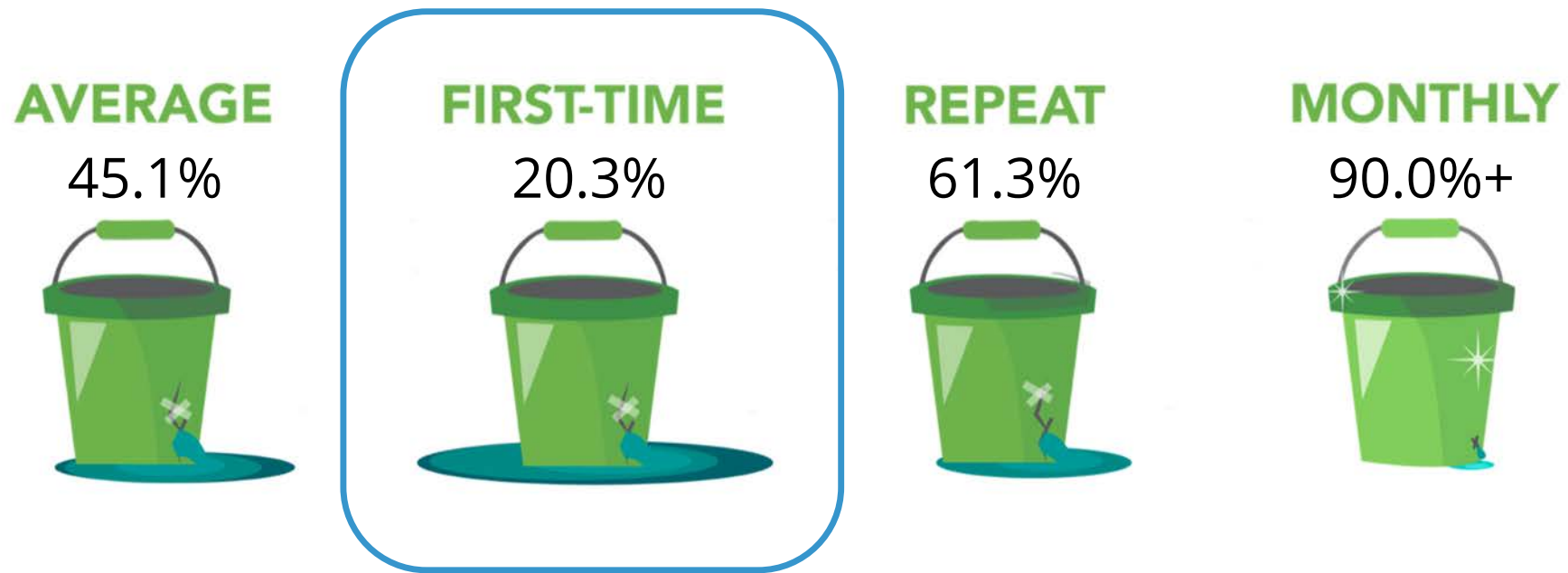
MONTHLY

90.0%+



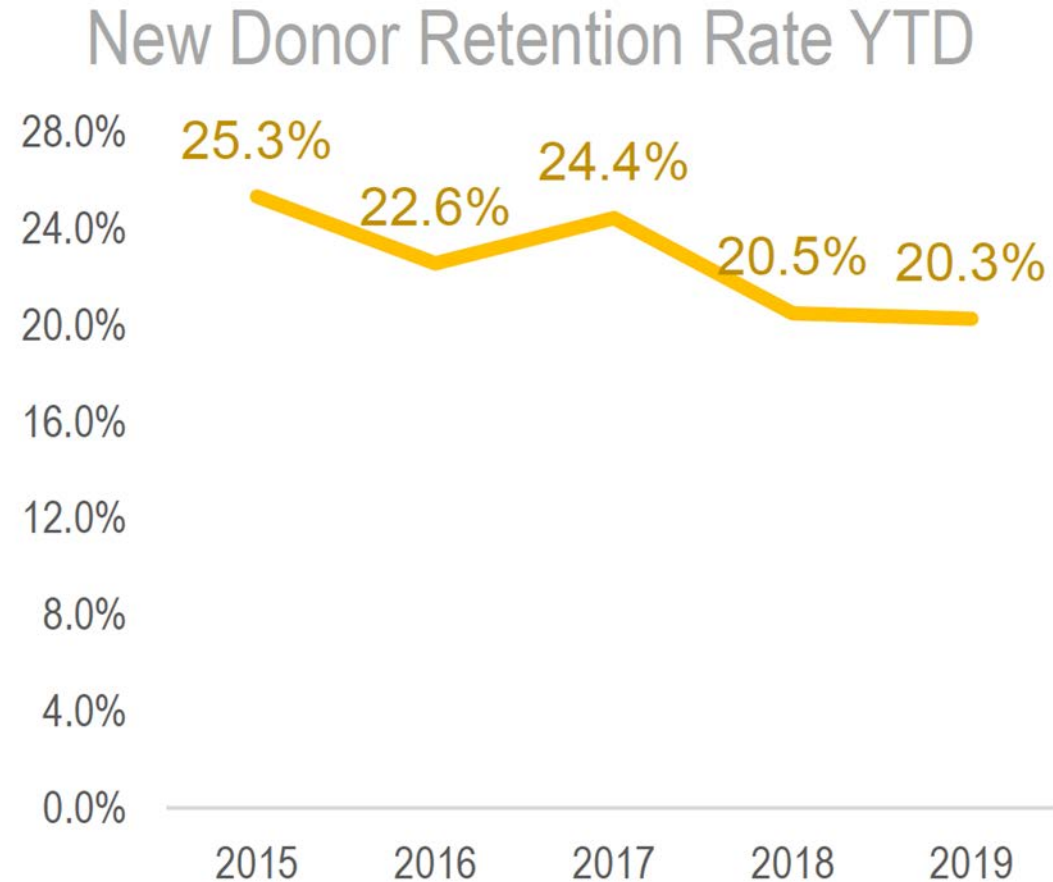
Source: Fundraising Effectiveness Project <http://afpfe.org>

Donor Retention



Source: Fundraising Effectiveness Project <http://afpfe.org>

New Donor Retention Over the Years



Source: Fundraising Effectiveness Project <http://afpfep.org>

Lost ROI

- Cost to acquire: \$29
- Donation: \$25
- Net: -\$4
- Ongoing marketing spend:
more \$s?



Impact of Improving First-time Retention

Improving First Time Donor Retention Equals Major Dollars											
Scenario One: 500 New Donors each year, 500 Existing Donors in year one, New Donor Retention 20%, Existing Donor Retention 60%											
Year	New Donors	Avg Gift	ND Dollars	ND Ret %	ND Kept	Exist Donors	Exist Ret %	Exist Don Kept	Avg Gift	Exist Don \$	Tot \$ Raised
One	500	\$200.00	\$100,000.00	20%	100	500.00	60%	300.00	\$250.00	\$125,000.00	\$225,000.00
Two	500	\$200.00	\$100,000.00	20%	100	400.00	60%	240.00	\$250.00	\$100,000.00	\$200,000.00
Three	500	\$200.00	\$100,000.00	20%	100	340.00	60%	204.00	\$250.00	\$85,000.00	\$185,000.00
Four	500	\$200.00	\$100,000.00	20%	100	304.00	60%	182.40	\$250.00	\$76,000.00	\$176,000.00
Five	500	\$200.00	\$100,000.00	20%	100	282.40	60%	169.44	\$250.00	\$70,600.00	\$170,600.00
Six	500	\$200.00	\$100,000.00	20%	100	269.44	60%	161.66	\$250.00	\$67,360.00	\$167,360.00
Seven	500	\$200.00	\$100,000.00	20%	100	261.66	60%	157.00	\$250.00	\$65,416.00	\$165,416.00
Eight	500	\$200.00	\$100,000.00	20%	100	257.00	60%	154.20	\$250.00	\$64,249.60	\$164,249.60
Nine	500	\$200.00	\$100,000.00	20%	100	254.20	60%	152.52	\$250.00	\$63,549.76	\$163,549.76
Ten	500	\$200.00	\$100,000.00	20%	100	252.52	60%	151.51	\$250.00	\$63,129.86	\$163,129.86
Grand Total											\$1,780,305.22
Scenario Two: 500 New Donors each year, 500 Existing Donors in year one, New Donor Retention 30%, Existing Donor Retention 60%											
Year	New Donors	Avg Gift	ND Dollars	ND Ret %	ND Kept	Exist Donors	Exist Ret %	Exist Don Kept	Avg Gift	Exist Don \$	Tot \$ Raised
One	500	\$200.00	\$100,000.00	30%	150	500.00	60%	300.00	\$250.00	\$125,000.00	\$225,000.00
Two	500	\$200.00	\$100,000.00	30%	150	450.00	60%	270.00	\$250.00	\$112,500.00	\$212,500.00
Three	500	\$200.00	\$100,000.00	30%	150	420.00	60%	252.00	\$250.00	\$105,000.00	\$205,000.00
Four	500	\$200.00	\$100,000.00	30%	150	402.00	60%	241.20	\$250.00	\$100,500.00	\$200,500.00
Five	500	\$200.00	\$100,000.00	30%	150	391.20	60%	234.72	\$250.00	\$97,800.00	\$197,800.00
Six	500	\$200.00	\$100,000.00	30%	150	384.72	60%	230.83	\$250.00	\$96,180.00	\$196,180.00
Seven	500	\$200.00	\$100,000.00	30%	150	380.83	60%	228.50	\$250.00	\$95,208.00	\$195,208.00
Eight	500	\$200.00	\$100,000.00	30%	150	378.50	60%	227.10	\$250.00	\$94,624.80	\$194,624.80
Nine	500	\$200.00	\$100,000.00	30%	150	377.10	60%	226.26	\$250.00	\$94,274.88	\$194,274.88
Ten	500	\$200.00	\$100,000.00	30%	150	376.26	60%	225.76	\$250.00	\$94,064.93	\$194,064.93
Grand Total											\$2,015,152.61
Impact of a 10% improvement in New Donor Retention											\$234,847.39

<https://bloomerang.co/blog/whats-the-impact-of-improving-1st-time-donor-retention/>

Impact of Improving Overall Retention

Original Retention Rate: 41% | **Improved Retention Rate: 51%**

Year	Donors	Avg. Gift*	Total	Year	Donors	Avg. Gift*	Total
Start	5,000	\$ 200.00		Start	5,000	\$ 200.00	
2	2,050	\$ 220.00	\$ 451,000	2	2,550	\$ 220.00	\$ 561,000
3	841	\$ 242.00	\$ 203,401	3	1,301	\$ 242.00	\$ 314,721
4	345	\$ 266.20	\$ 91,734	4	663	\$ 266.20	\$ 176,558
5	141	\$ 292.82	\$ 41,372	5	338	\$ 292.82	\$ 99,049
6	58	\$ 322.10	\$ 18,659	6	173	\$ 322.10	\$ 55,567
7	24	\$ 354.31	\$ 8,415	7	88	\$ 354.31	\$ 31,173
8	10	\$ 389.74	\$ 3,795	8	45	\$ 389.74	\$ 17,488
9	4	\$ 428.72	\$ 1,712	9	23	\$ 428.72	\$ 9,811
10	2	\$ 471.59	\$ 772	10	12	\$ 471.59	\$ 5,504
11	—	—	—	11	6	\$ 518.75	\$ 3,088
12	—	—	—	12	3	\$ 570.62	\$ 1,732
13	—	—	—	13	2	\$ 627.69	\$ 972
14	—	—	—	14	1	\$ 690.45	\$ 545

Grand Total from Original Donors: **\$ 820,859**

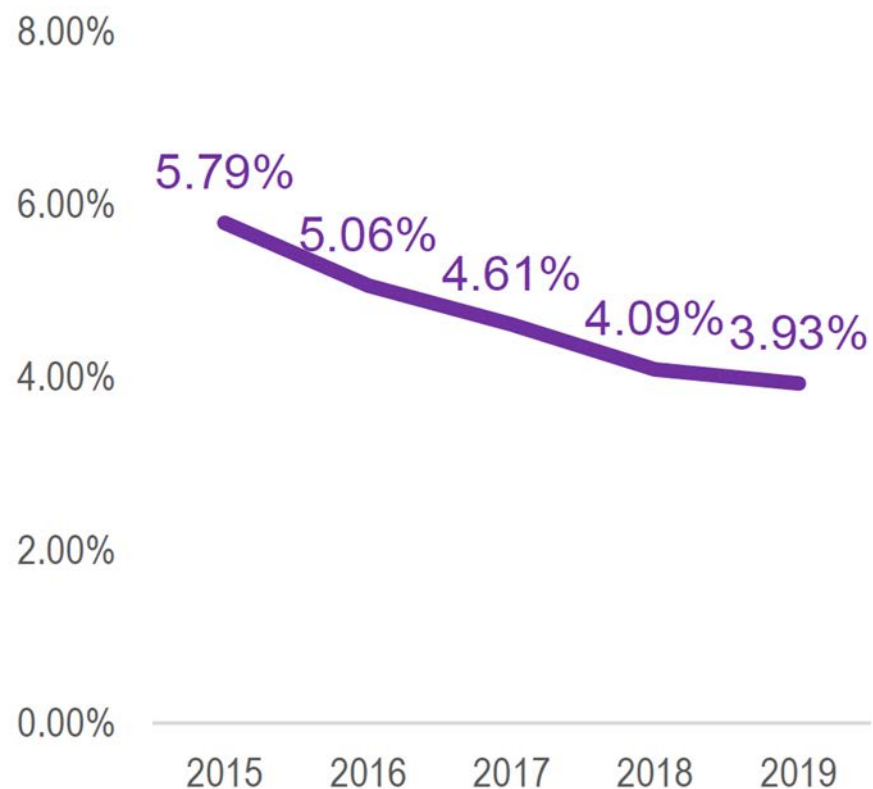
Grand Total from Original Donors: **\$ 1,277,208**

Total Savings: \$ 456,349

<https://bloomerang.co/resources/guides/donor-retention-math-made-simple/>

Recapturing Lapsed Donors is Even Harder

Recapture Rate YTD



Source: Fundraising Effectiveness Project <http://afpfep.org>

Speed of Acquiring Second Gift



<http://www.analyticalones.com/the-exponential-importance-of-second-gift-timing/>



Acquiring Donors is harder

- Cost per acquisition = 5x cost per renewal
- Cost per acquisition = 2-3x initial donation amount
- Renewal response rates = 20x30 higher than acquisition response rates

Source: Adrian Sargeant - Lilly School of Philanthropy

Best Bequest Prospects

- Length of giving to your organization (5+ years of regular giving)
- Giving to you over a long period of time (Giving may not be year after year - but gifts have been made over a long, extended period of time)
- Frequency of Giving (monthly credit card donors, multiple gifts within a year)
- Is an active volunteer (at one time or now a board member, or a volunteer in some manner)
- The Family has been involved in some way in the organization (best if there is a long-time association)



How do we keep donors?

Key Drivers of Donor Commitment



- 2011 study
- Survey of 1,200 recent (last 12 months), frequent (more than 2 gifts to cause based charities) donors from over 250 nonprofit organizations
- Donors were given a list of 32 reasons why they might continue giving
- Asked to rank them by order of importance

<http://www.thedonorvoice.com/national-donor-commitment-study/>

Key Drivers of Donor Commitment

1. Donor perceives organization produces outcomes
2. Donor knows what to expect with each interaction
3. Donor receives a timely thank you
4. Donor receives opportunities to make views known
5. Donor feels like they're part of an important cause
6. Donor feels his or her involvement is appreciated
7. Donor receives info showing who is being helped

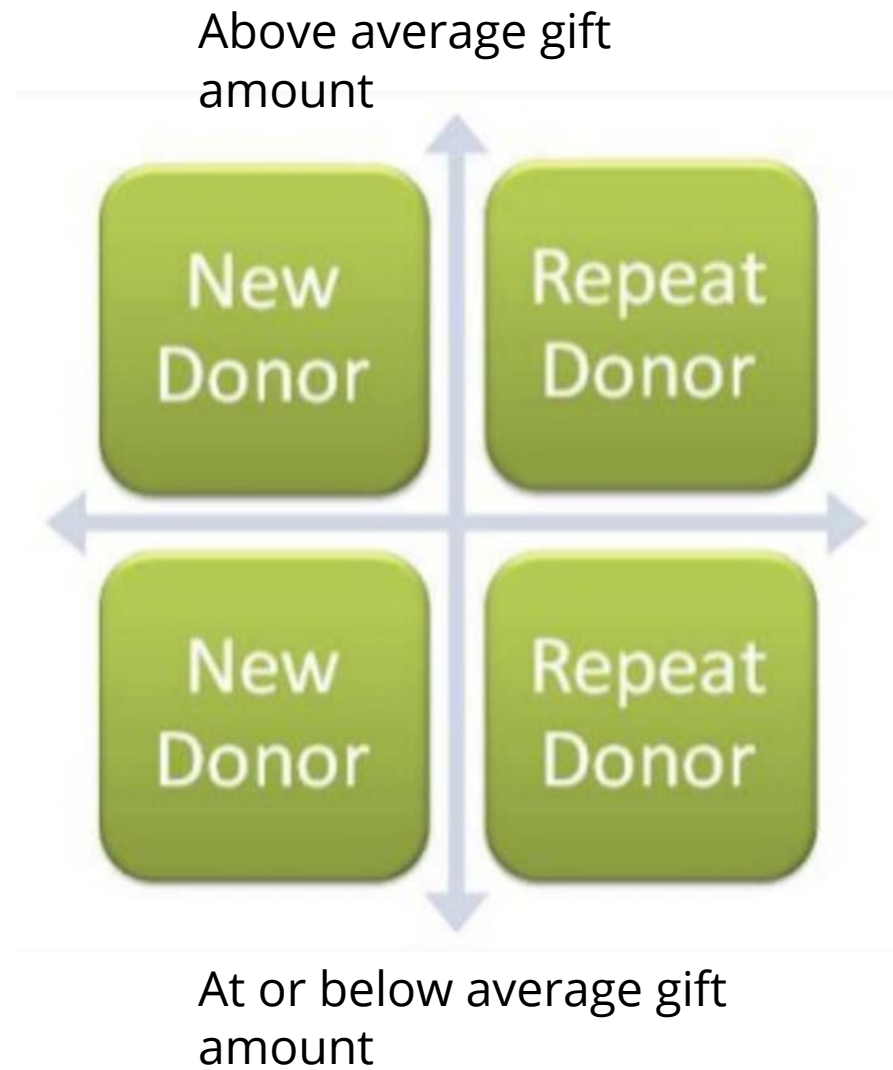


How can we give first-time donors...

- A fast thank you
- Impact stories
- Preview of future communications
- A feedback mechanism
- A second opportunity to give – quickly
- ...all in a donor-centric way?

Unique Communications for New Donors

Communications Segmenting



	Given Above Average Gift Size	LYBUNT*	SYBUNT*	Never Given
Current Parents	Segment 1 (9/35)	Segment 2 (37)	Segment 4 (54)	Segment 6 (675)
Non-Parents	Segment 1 (26/35)	Segment 3 (64)	Segment 5 (150)	Segment 7 (150 staff + 340 send/870)
	(\$500+)	(7/1/14-6/30/15)	(Before 7/1/14)	

	Never Given	Given Once (Over a Year Ago)	Given Once (Last Year)	Given Multiple Times
Above Average Gift Size	Segment 1	Segment 2	Segment 4	Segment 6
At or Below Average Gift Size	Segment 1	Segment 3	Segment 5	Segment 7

	Never Given	Has Given
Current Parent	Segment 1	Segment 3
Non-Parent	Segment 2	Segment 4

Heather Carroll
Executive Director at
Skaneateles Education
Foundation



New Donor **Cultivation Timeline** (First 90 Days)



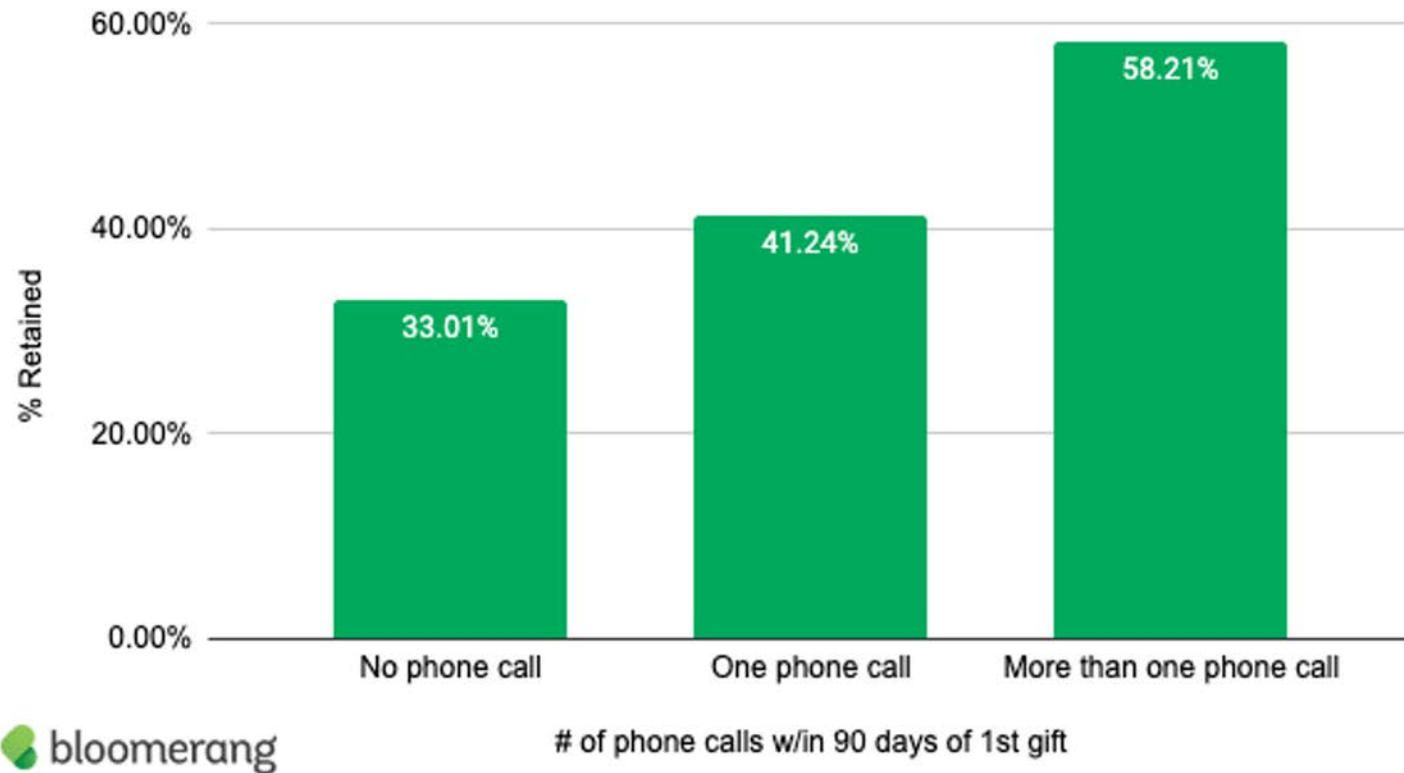
The Personal Touch

- First-time donors who get a personal thank you within 48 hours are 4x more likely to give a second gift. (McConkey-Johnston International UK)
- A thank-you call from a board member to a newly acquired donor within 24 hours of receiving the gifts will increase their next gift by 39%. (Penelope Burk)



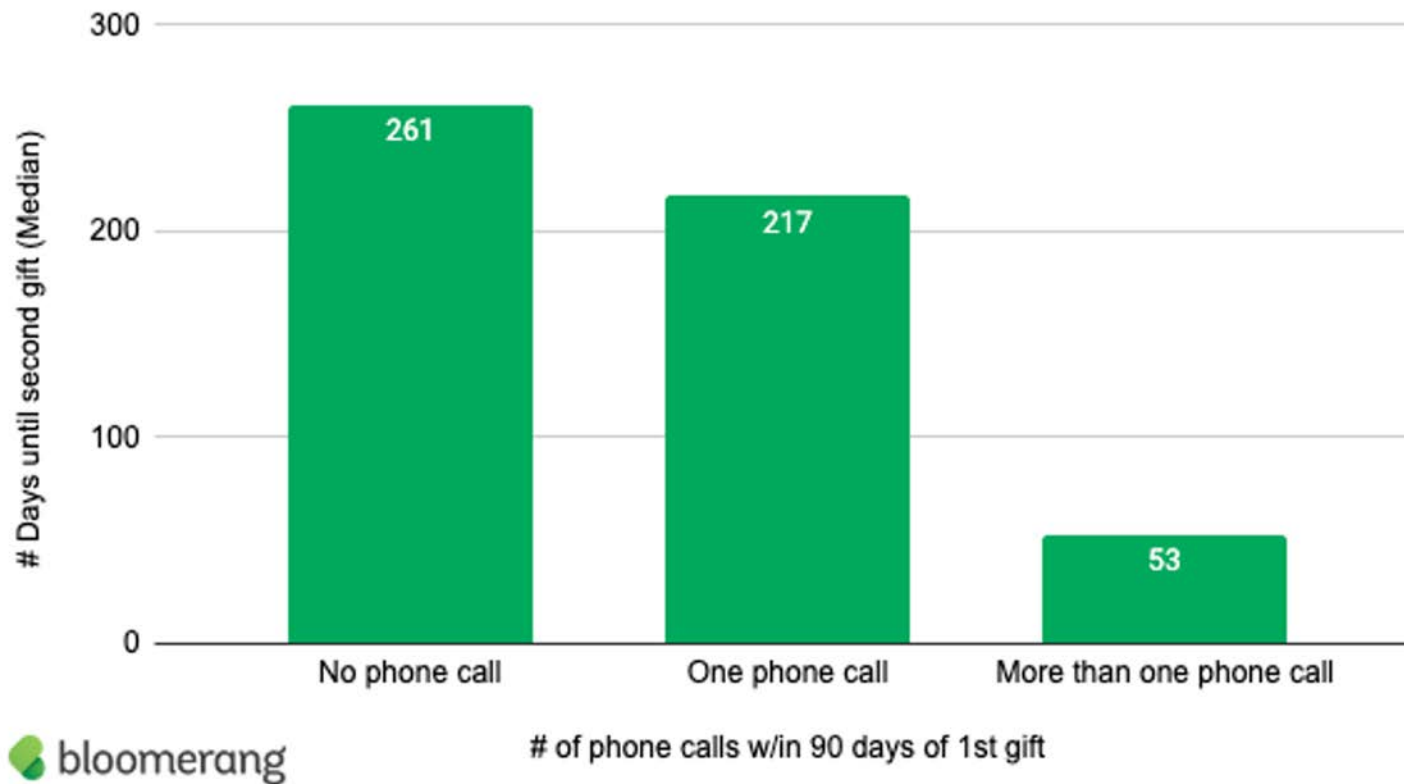
Bloomerang Research

Impact of phone calls on 1st-time donor retention



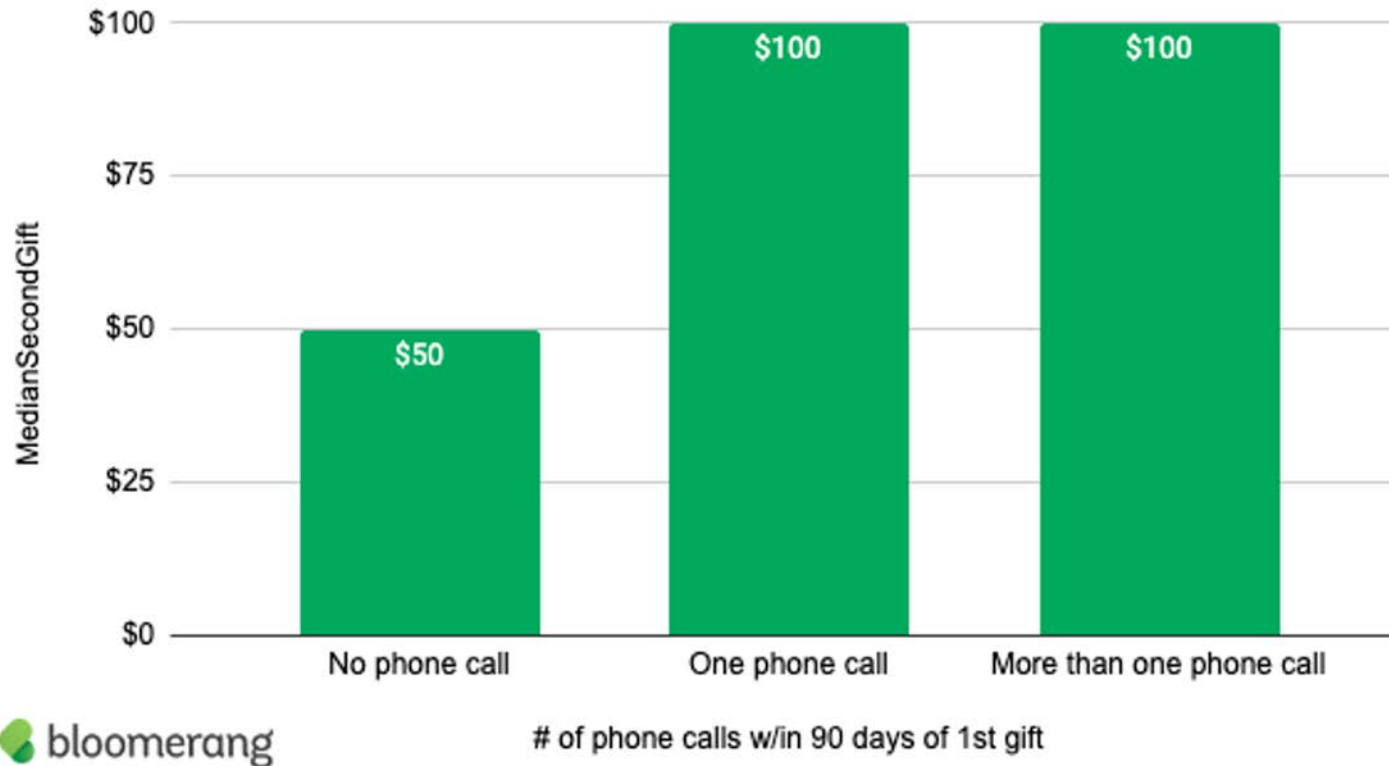
Bloomerang Research

Impact of phone calls on speed of second gift



Bloomerang Research

Impact of phone calls on second gift size



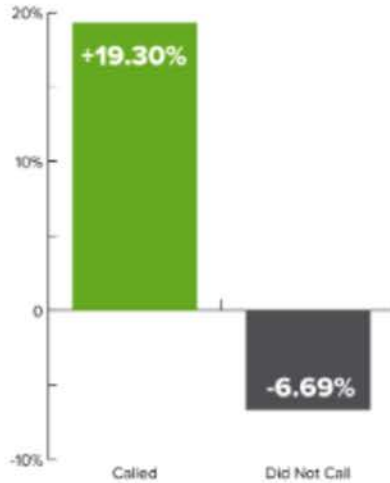
Bloomerang Research

Percent Change in Revenue (compared to March/April 2019)



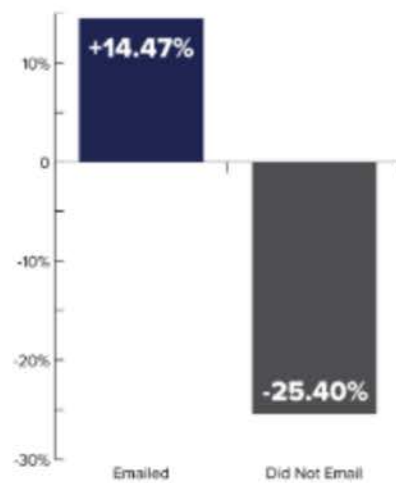
Customers are grouped based on whether or not they recorded any interactions through each channel between March 1st and April 30th.

Phone Calls



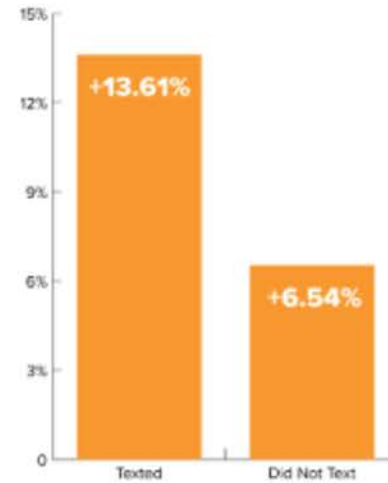
Phone Calls	Customers	%
Called	955	24%
Did Not Call	3,056	76%

Personal Emails



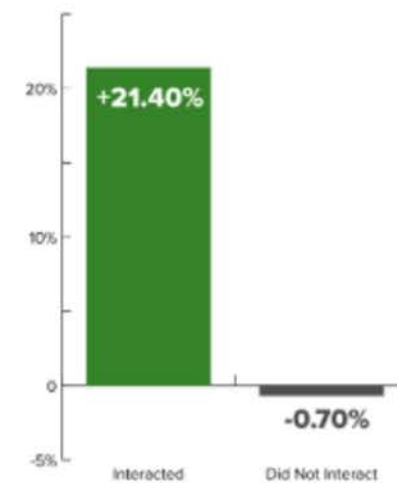
Personal Emails	Customers	%
Emailed	2,185	54%
Did Not Email	1,826	46%

Text Messages



Text Messages	Customers	%
Texted	187	5%
Did Not Text	3,824	95%

In-Person Interactions



In-Person	Customers	%
Interacted	629	16%
Did Not Interact	3,382	84%

<https://bloomerang.co/blog/data-shows-the-effectiveness-of-personal-outreach-to-donors-during-covid-19/>

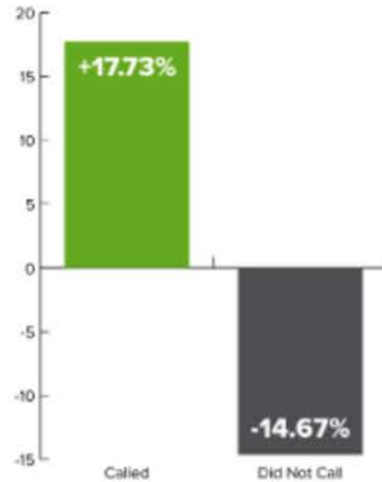
Bloomerang Research

Percent Change in Revenue (compared to Spring 2019)



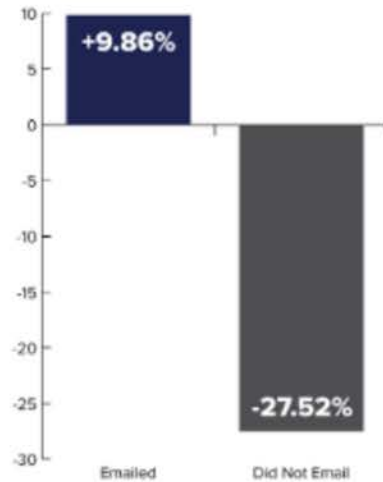
Customers are grouped based on whether or not they recorded any interactions through each channel between March 1st and May 31st.

Phone Calls



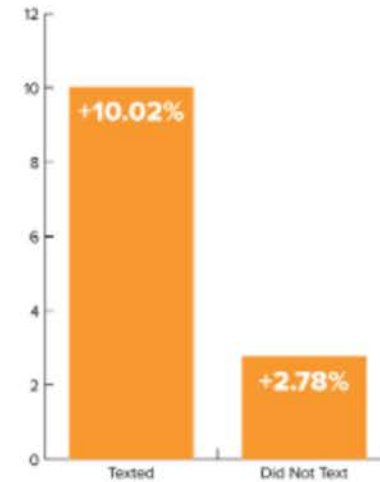
Phone Calls	Customers	%
Called	1,085	26%
Did Not Call	3,015	74%

Personal Emails



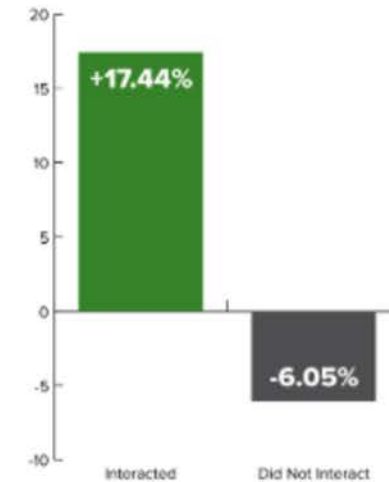
Personal Emails	Customers	%
Emailed	2,360	58%
Did Not Email	1,740	42%

Text Messages



Text Messages	Customers	%
Texted	234	6%
Did Not Text	3,866	94%

In-Person Interactions



In-Person	Customers	%
Interacted	729	18%
Did Not Interact	3,371	82%

<https://bloomerang.co/blog/data-shows-the-effectiveness-of-personal-outreach-to-donors-during-covid-19/>

THANK YOU
for your *first* gift!



Here at The Oaks, relationships come first.
We welcome you into our family of donors,
partners, volunteers and supporters.

Every day is a great day to visit The Oaks Academy.
To see your gift at work through a personal visit or tour,
please contact:

advancement@theoaksacademy.org | 317.931.3687





Inspiring all girls to be strong, smart, and bold

Girls Inc. of Greater Indianapolis
3035 N. Meridian Street
Indianapolis, IN 46208
(317) 283-0086
girlsincindy.org

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Andi Metzler
1st Vice Chair

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2nd Vice Chair

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Elyssa Campodonico-Barr
President & CEO



Community Partner

Dear Steven,

On behalf of Girls Inc. of Greater Indianapolis, I want to thank you again for your support of girls in the Greater Indianapolis community. You are now part of our Girls Inc. family that equips girls with the skills needed to face the challenges of today and prepare for a bright tomorrow.

We know you chose to give your gift because you share our understanding of the obstacles that girls face in today's world.

- Over 70% of girls ages 15 to 17 avoid normal daily activities like attending school when they feel negatively about their looks.
- Indiana ranks 46th of 50 states with regard to the wage gap between men and women, with women earning only 74 cents for every dollar men earn.
- Children in homes where domestic violence is present are 1500% more likely to become victims themselves.

The collective financial support from donors like you provides developmentally-appropriate, hands-on programming that prepares girls to overcome these and other obstacles.

- *Redefining Beauty: Redefining Beauty builds self-esteem and self-confidence in girls by confronting body image stereotypes and identifying healthy lifestyle habits.*
- *Young Women in Leadership (YWIL): A year-long program for emerging leaders in high school, YWIL helps them focus on leadership development and college and career preparedness.*
- *Project BOLD: Project Bold helps girls identify resources and people to increase their personal safety, while providing basic self-defense techniques. This violence-prevention program provides a safe environment for girls to ask questions, get answers, and feel supported.*

Our work extends far beyond these three programs. You are supporting over 4,000 girls annually through hundreds of programs happening all around Indianapolis. You can be confident that we are using your gift wisely as we continuously reassess our curriculum, train engaged volunteers, and strive for more positive outcomes. We want you to know that our mission of inspiring all girls to be strong, smart, and bold is one we are happy to share with you. We look forward to continuously striving to better prepare girls for a life of creativity, empowerment, and growth with you.

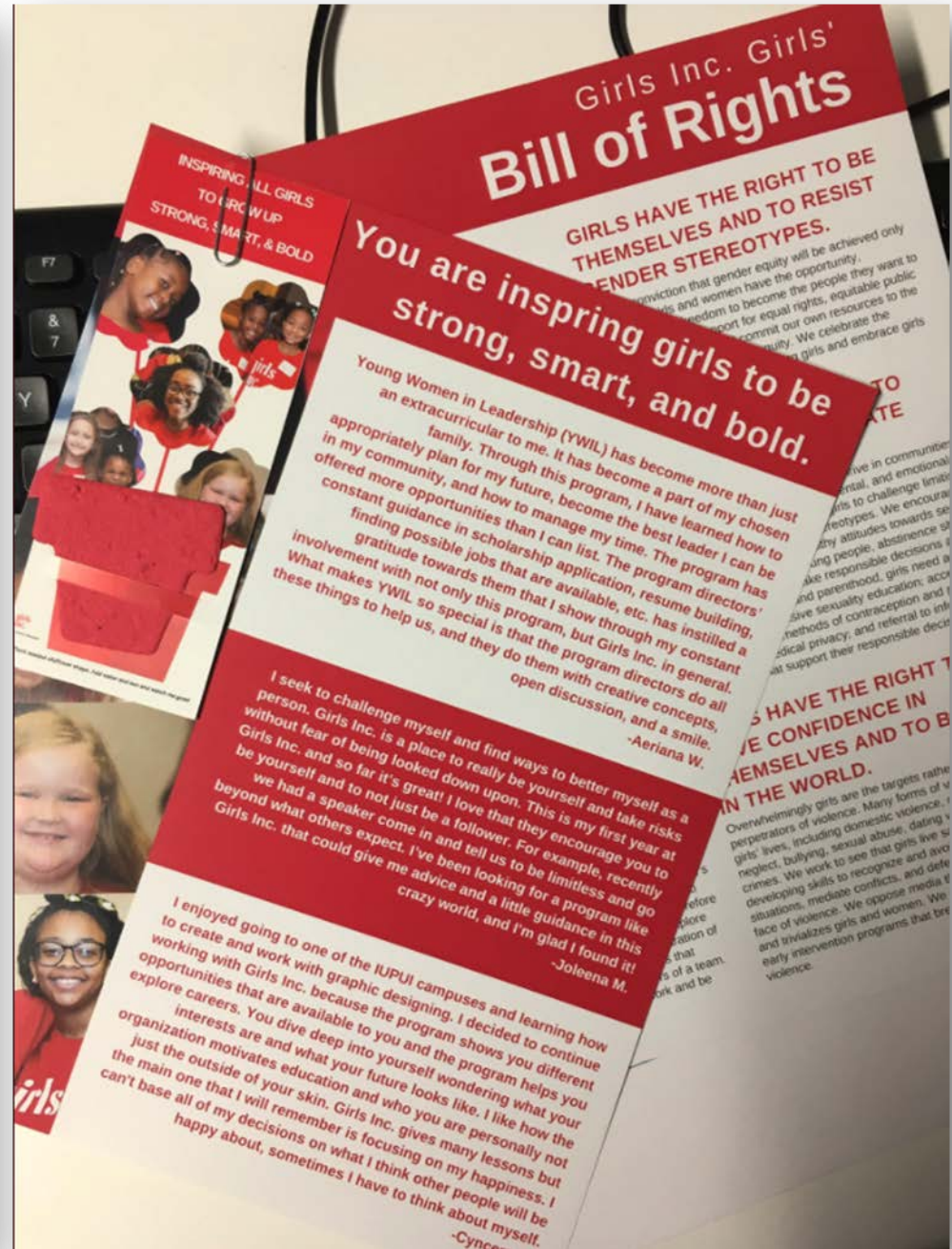
Sincerely,

Madeleine

Madeleine Smith, CFRE
Vice President of Development & Public Relations

Stay connected to Girls Inc. Indy by following us on social media and signing up for our newsletter at www.girlsincindy.org under "Connect With Us."

We are grateful for you!



Thank you!



Mike Elliott <melliott@outreachindiana.org>

Nov 2 (5 days ago)



to me, Eric

Hi Steven,

Thank you so much for becoming a monthly donor! You and your family give Outreach the ability to bring hope to homeless youth. I have made a quick 2min video for you to share what your monthly gift does for the mission of Outreach – [click here to view](#)

Thank you again, Eric, and I are truly humbled to have your support in the mission of Outreach.

Mike Elliott | Director of Development
[2416 E. New York St Indianapolis, IN 46201](#)
Direct: [317-653-1545](#) Mobile: [317-600-9561](#)



OUTREACH
Hope for homeless youth



GMAIL

COPY LINK



Thank you Steven!



Donor Retention by Age/Channel



Donors across all age groups give online, offline, and through both channels. It's a myth that older donors will not give online. In fact, the data shows that older online donors are the most loyal.

FIRST YEAR DONOR RETENTION BY AGE

AGE	ONLINE ONLY	OFFLINE ONLY	MULTICHANNEL
18 – 24	19%	24%	50%
25 – 34	22%	25%	55%
35 – 44	21%	24%	54%
45 – 54	21%	24%	52%
55 – 64	22%	26%	58%
65 – 74	24%	29%	62%
75+	26%	26%	59%

Source: Blackbaud Target Analytics

 BLACKBAUD INSTITUTE



THANK YOU FOR YOUR DONATION!

[RESEARCH.](#) [EDUCATE.](#) [ADVOCATE.](#) [MOBILIZE.](#)

Join the Conversation



Receipt [REDACTED]

\$5 2015 x



to me ▾

[REDACTED]centers.org via [clickandpledge.cc](#)

🔗 5/21/15 ☆



Receipt

Important!

This payment will appear as "[REDACTED]" on your bank statement. We recommend that you print a copy of this receipt for comparison with your bank statement, as well as for your personal records.

Thursday, May 21, 2015 [1:33:31 PM]

[REDACTED]

[REDACTED]

Chicago, Illinois 60657

United States of America

Email : [sk\[REDACTED\]](#)

Phone : 7[REDACTED]

Receipt 21999-992416



Spam x



st [redacted] om
to me ▾

📧 5:43 AM (56 minutes ago) ☆



This message may not have been sent by:

st [redacted] om [Learn more](#) [Report phishing](#)



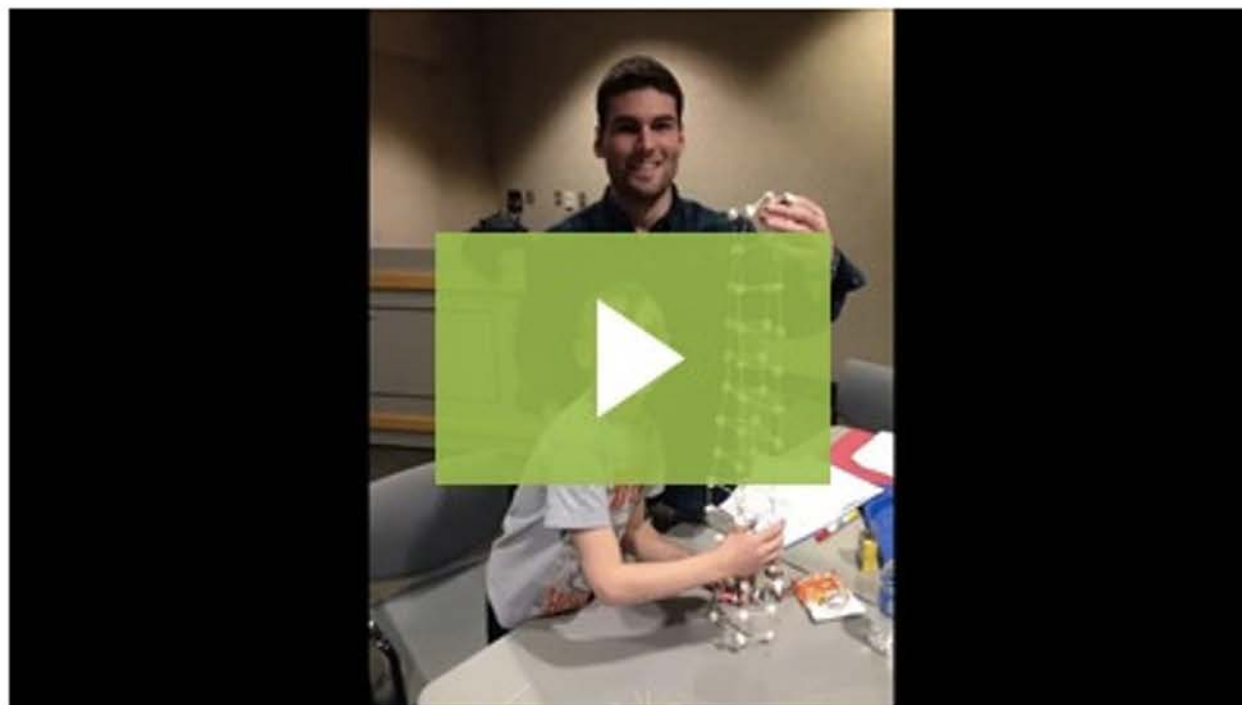
Anti-virus warning - 1 attachment contains a virus or blocked file. Downloading this attachment is disabled. [Learn more](#)



Receipt 21999-99...
Blocked file

thank you, steven!

Thank you for your generous gift! See what your dollars make possible.





Thank you for investing in College Mentors for Kids!



Your gift will help provide a caring college student mentor to a child in need. Through structured activities that take place on the college campus, kids learn about possibilities for their future and are encouraged to pursue their goals, no matter what their circumstances! You are helping kids unlock their potential, so they can have a brighter tomorrow. A tax letter with details of your gift will be sent to the address you provided next month. Thank you!

To keep up with what's happening at College Mentors and to see success stories YOU make possible, follow us on social media:



Key Drivers of Donor Commitment

1. Donor perceives organization produces outcomes
2. Donor knows what to expect with each interaction
3. Donor receives a timely thank you
4. Donor receives opportunities to make views known
5. Donor feels like they're part of an important cause
6. Donor feels his or her involvement is appreciated
7. Donor receives info showing who is being helped

Survey Question Ideas

- “Why did you first give?”
- “What’s your connection to the cause?”
- “What would you like to hear from us?”
- “How would you rate your experience?”
- “Was it easy to donate?”
- “Did we thank you appropriately?”

Let them tell their story!

<http://www.thedonorvoice.com/national-donor-commitment-study/>

Bloomerang

crm.bloomerang.co/Mailing/Email/Survey/Edit/1

bloomerang

New Donor Survey

Preview Survey [↗](#) Cancel Save And [▼](#)

Design Tracking Responses

Email Design

Edit Styles Ahern Audit Send Test

We can't do this without you!

Dear ,

Your support for our mission means so much more than we can convey with a simple "thank you". Without you, [FILL IN OUTCOME] would not be possible.

There's something else you can give that's just as valuable - your honest opinion. Would you mind taking 2 minutes of your time to tell us how we can make you feel more connected to JamesGoalderDemo? It would mean so much!

Sincerely,
Executive Director

[Begin Survey](#)

Our Contact Information
JamesGoalderDemo
5625 North Post Road
Indianapolis, VA 46216
8663322999
www.bloomerang.co

3. I trust Blossom's Orangutan Rescue to deliver the outcomes it promises for its beneficiaries

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Strongly Disagree

Strongly Agree

4. I was thanked appropriately for my gift to Blossom's Orangutan Rescue

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Strongly Disagree

Strongly Agree

5. Overall I am very satisfied with how Blossom's Orangutan Rescue has treated me as a new donor

1	2	3	4	5	6	7
---	---	---	---	---	---	---

0 of 10 answered 1 2 3 4 5 6 7 8 9 10

Previous

Next

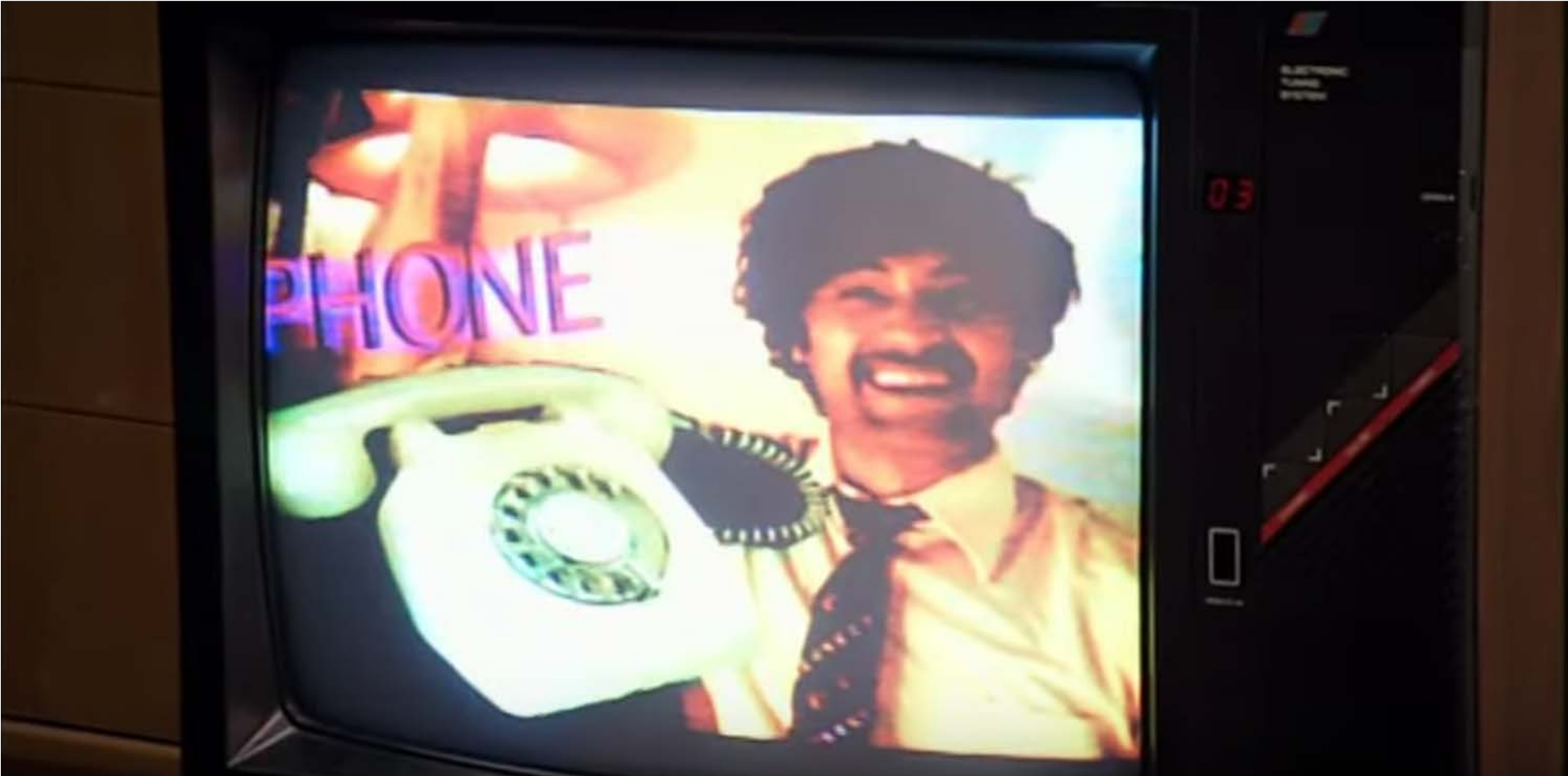
2 Common “One and done’s”

1) Memorial donors

- Thank (if you can), then isolate

2) Peer-to-peer donors

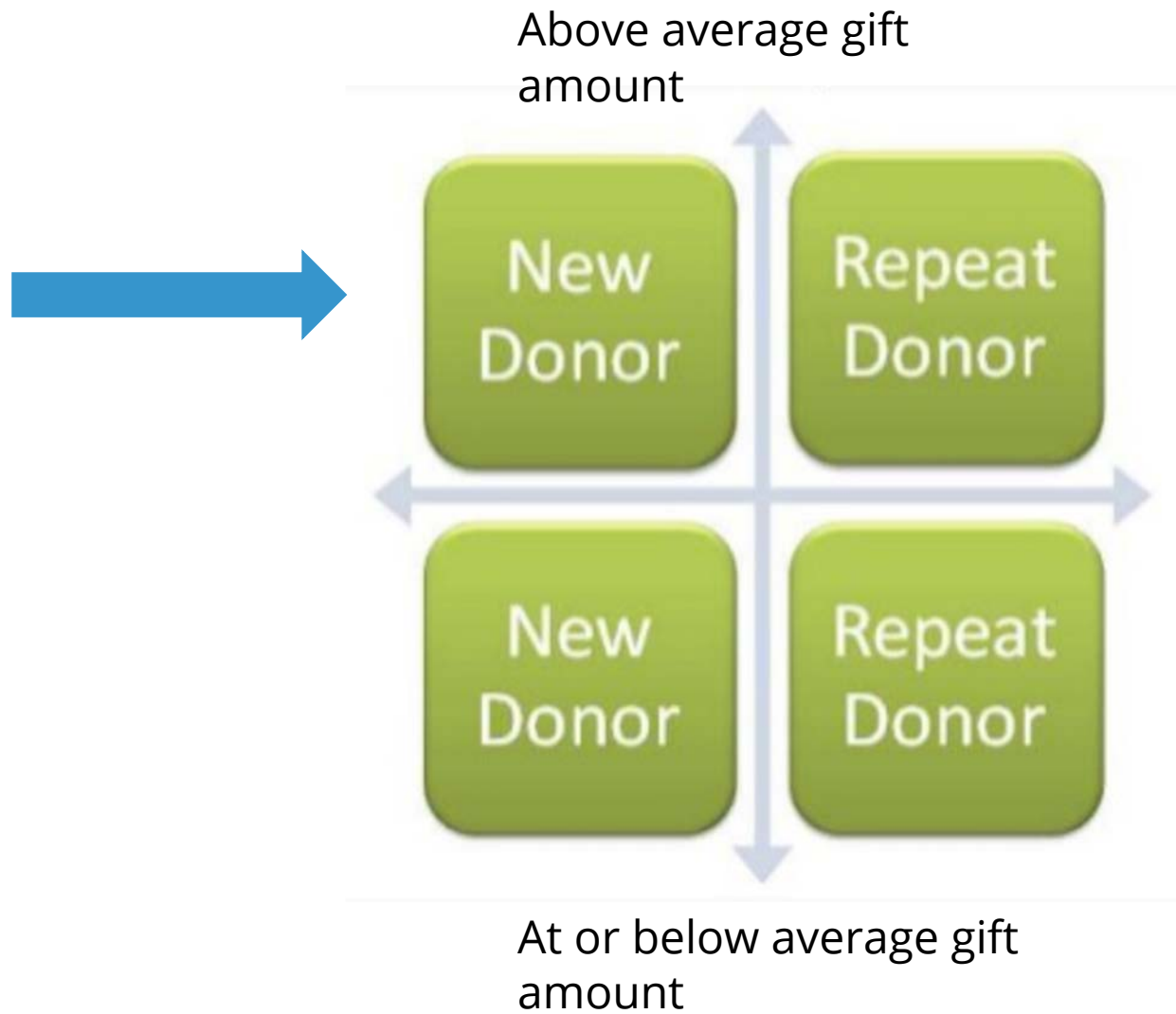
- Have first gift acknowledgement come from fundraiser, not benefiting org
 - (Re)introduce the charity
 - Explain why fundraiser supports it
 - Ask for donor to continue support



Why a Phone Call

- Research shows that it's effective
- No technology/equipment barrier
- Will stand out in our impersonal, digital world
- Voicemails are just as good
- Opportunity to get to know the donor
- Scalable with help of board members/volunteers

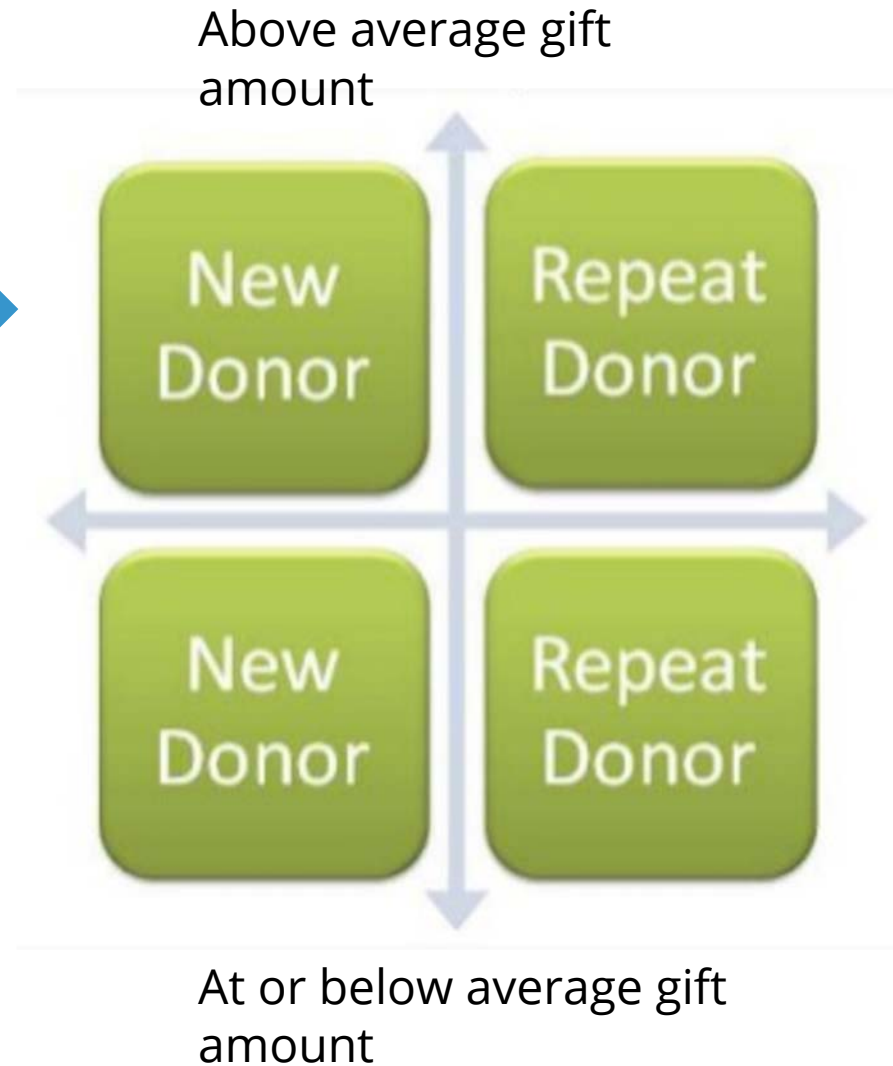
Why to Call



Why to Call



Penelope Burk: 70% of survey respondents who gave \$10k to one organization also made a \$100 gift to another organization.
New donors rarely give at capacity!



Final Thoughts

- Prioritize new donors
- Get to know them
- Pick up the phone
- Ask early, after stewarding
- Involve board members

The background features a grid of small, semi-transparent portraits of diverse individuals. Overlaid on this is a series of yellow, wavy lines that create a sense of movement and connectivity across the frame.

Interactive Activity

ONE VOLUNTEER NEEDED

Raise
2020

A woman with dark hair, wearing a black headset with a microphone, is looking at a laptop screen. She is wearing a dark blue shirt with white polka dots. Her hands are raised in a gesturing motion. The background is a blurred office setting. The image is overlaid with a blue diagonal shape on the left side, which contains text and a logo. There are also yellow wavy lines in the top left corner.

QUESTIONS?

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robotsmakebadfundraisers.com

Raise
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Session Ratings

Don't forget to rate each session!

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