

**Donor-Centric Stewardship:
*Love the One You're With!***


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The Good, Better

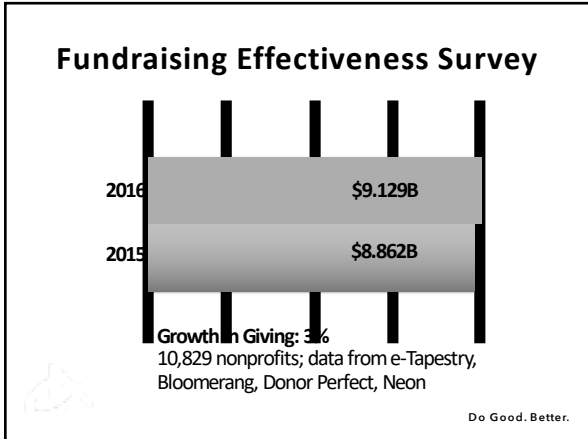
Capital Campaigns | Fundraising Strategy | Board Development | Strategic Planning
Donor Stewardship | CRM for nonprofits

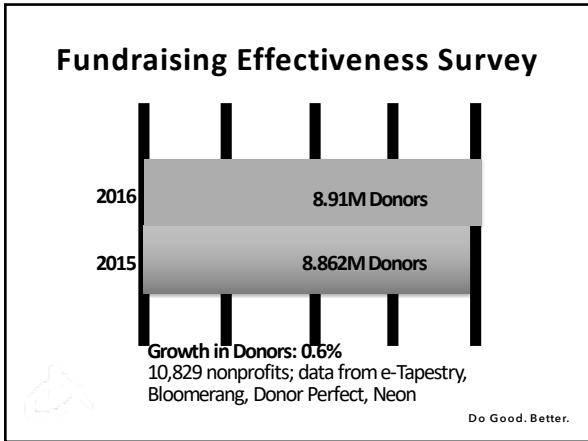
Learning Objectives

- Recognize the importance and impact of donor retention
- Understand the key principles of donor-centricity and how to apply them in your organization
- Develop strategies for increasing donor trust and loyalty
- Identify opportunities for others in your organization to support effective donor stewardship
- Learn how to measure and monitor evidence of good donor stewardship



**Startling Statistics
about
Donor Retention**







Gains & Losses

The largest growth in gift dollars/donors came from new gifts/donors

The greatest losses in gift dollars/donors came from lapsed new gifts/donors

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RETAINED | **LOST**

Donors who increase revenue

New
Recaptured
Upgraded

Lapsed new
Lapsed repeat
Downgrade

Donors who lose revenue

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Average Donor Retention Rate

45%

Measuring Donor Retention

Divide Year 2 overlap by Year 1 = Donor Retention Rate

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Measuring Donor Retention

$400 / 1,000 = 40\%$ Donor Retention
(60% Donor Attrition)

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Or let your database do it for you!

Donor Retention Rate Report

| | YTD14 - 12/31/14 | YTD13 - 12/31/13 | YTD12 - 12/31/12 |
|----------------------------------|------------------|------------------|------------------|
| New Donors | 363 | 421 | 342 |
| New Donors Retention | --- | 100 | 124 |
| New Donor Retention Rate | --- | 24% | 36% |
| Established Donors | 245 | 327 | 330 |
| Established Donors Retention | --- | 100 | 272 |
| Established Donor Retention Rate | --- | 76% | 80% |
| Total Donors | 363 | 421 | 342 |
| Total Donors Retention | --- | 492 | 400 |
| Total Donor Retention Rate | --- | 51% | 41% |

Your database *can* do it, right?!?!

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My Organization •

Giving Dynamics Report

Totals From Your Database

Showing 1 - 7 of 7

| Status | Number of Donors | % of Donors | 1/1/2015 - 12/31/2015 | 1/1/2016 - 12/31/2016 | \$ Changed | % Change |
|---------------|------------------|-------------|-----------------------|-----------------------|------------------|-----------|
| Totals | 1349 | | \$946,675 | \$1,166,751 | \$220,077 | 23 |
| New | 392 | 29 | \$0 | \$293,341 | \$293,341 | 0 |
| Recapture | 133 | 9 | \$0 | \$715,895 | \$715,895 | 0 |
| Upgrade | 203 | 15 | \$144,637 | \$287,326 | \$136,689 | 94 |
| Total Gains | - | - | \$144,637 | \$607,862 | \$447,166 | 0 |
| Same | 130 | 9 | \$305,180 | \$305,180 | \$0 | 0 |
| Downgrade | 163 | 12 | \$342,490 | \$166,769 | (\$175,721) | (50) |
| Lapsed New | 231 | 17 | \$65,172 | \$0 | (\$65,172) | (100) |
| Lapsed Other | 97 | 7 | \$64,196 | \$0 | (\$64,196) | (100) |
| Total Losses | - | - | \$402,838 | \$166,769 | (\$234,069) | 0 |
| Net | - | - | \$543,837 | \$1,166,751 | \$622,914 | 0 |

Giving Dynamics Report

Average Across 4,986 Databases

Showing 1 - 7 of 7



| Status | Number of Donors | % of Donors | 1/1/2015 - 12/31/2015 | 1/1/2016 - 12/31/2016 | \$ Changed | % Change |
|---------------|------------------|-------------|-----------------------|-----------------------|-------------------|------------|
| Totals | 742 | | \$548,468 | \$528,185 | (\$20,283) | (3) |
| New | 199 | 26 | \$0 | \$111,423 | \$111,423 | 0 |
| Recapture | 66 | 9 | \$0 | \$46,229 | \$46,229 | 0 |
| Upgrade | 75 | 10 | \$97,296 | \$195,146 | \$97,850 | 100 |
| Total Gains | - | - | \$97,296 | \$302,797 | \$205,501 | 263 |
| Same | 62 | 8 | \$62,297 | \$62,297 | \$0 | 0 |
| Downgrade | 68 | 9 | \$193,457 | \$95,092 | (\$98,365) | (50) |
| Lapsed New | 162 | 21 | \$80,636 | \$0 | (\$80,636) | (100) |
| Lapsed Other | 110 | 14 | \$116,872 | \$0 | (\$116,872) | (100) |
| Total Losses | - | - | \$390,965 | \$95,092 | (\$295,873) | (75) |
| Net | - | - | \$157,331 | \$528,185 | \$370,854 | 236 |

Average Donor Retention Rate

45%



What can we do to fix this?



What can we do to fix this?

**Donor
Centered
Stewardship**



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What is Stewardship anyway?



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What is Stewardship anyway?

- ✓ Thanking
- ✓ Honoring donor intent
- ✓ Recognizing donor commitment & loyalty
- ✓ Engaging in dialogue with donors
- ✓ “Loving up” our donors in special and meaningful ways



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It’s more than just *lovin’ up*


- ✓ Proper acknowledgement & record keeping
- ✓ Correct gift handling & allocation
- ✓ Proficient money management & financial oversight
- ✓ Consistent, accurate, transparent reporting
- ✓ Rigorous ethics



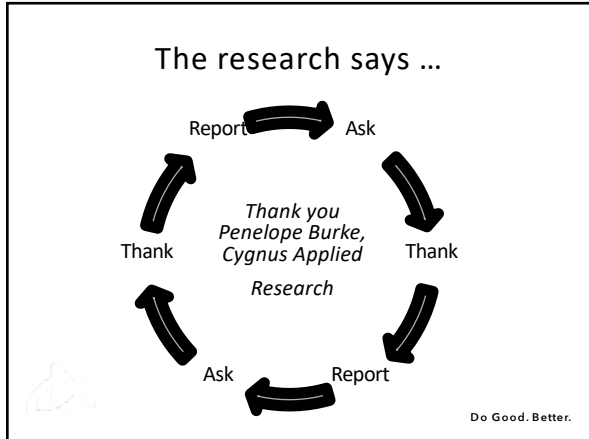
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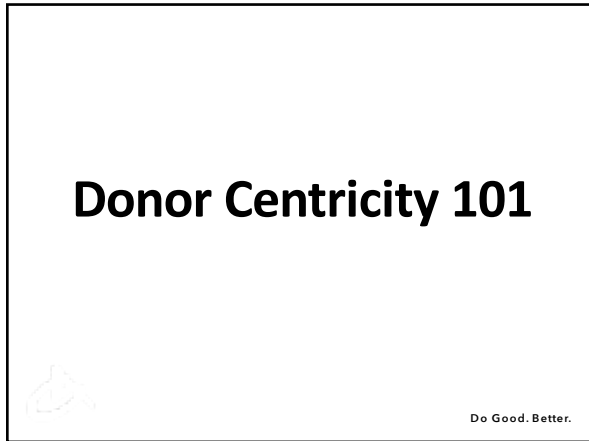
What’s the difference?

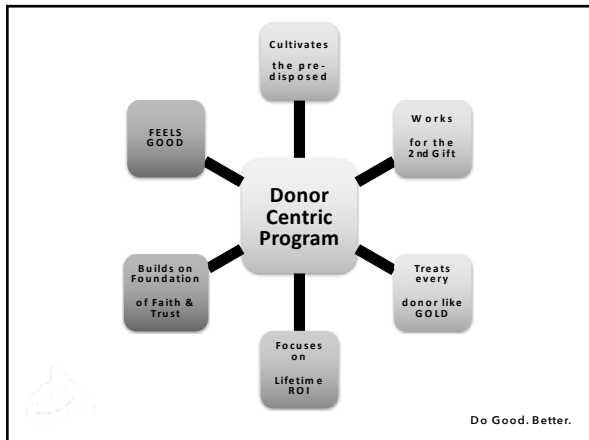
-  Cultivation
-  Acknowledgement
-  Recognition
-  Stewardship




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Strategies for Donor Retention



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Get the whole team involved


- Receptionist
- Data Entry
- Accounting
- Program
- CEO
- Board



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Make *your* plan!

What are you going to differently next week?



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