

Donor/Member Retention Best Fundraising Practices Building Your Organization's Membership & Annual Donor Base



RILWP Workshop June 2, 2009



Part 2 – Information Management Needs

Information for Current Assessment

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Gayle's Top Data Picks

- ✧ 'Donor Pyramids' for past 2 years
- ✧ 'LYBNT' and 'SYBNT' summaries
- ✧ 'LY's income by gift type
- ✧ 'LY's income by donor type
- ✧ 'LY's & 'AY's donors by town and/or zip
- ✧ 'LY's total new donors/members
- ✧ 'LY's total 'dropped' donors/members
- ✧ Total donors/members



Gayle's Top Information Picks

- ✧ **Current annual organization budget**
 - ✧ **Percentage of income by source**
 - ✧ **Percentage of income by program**
 - ✧ **Percentage of expense by program**
- ✧ **Outline of current fundraising program**
 - ✧ **Calendar of donor events and asks**
 - ✧ **Calendar of communications**
 - ✧ **Census printout for your zip codes, towns or geographic areas, by household and income**





✧ **A very small sample database has been created in Salesforce to demonstrate reporting needed for Gayle's Top Data Picks.**

✧ **You can use any CRM program or even prepare this information by hand.**

✧ **Remember the detailed 'recipes' for replicating these reports in Salesforce will be available after the presentation via an Internet Powerpoint to share within your nonprofit.**



What's A 'Donor Pyramid'?



'Donor Pyramids' show either the number of givers or the amount of gifts across the range of gift size. Typically, there are many donors giving small donations and relatively fewer donors giving large donations.

The shape of your organization's donor pyramid informs your fundraising efforts.





What Do You Need to Calculate a Two Year 'Donor Pyramid'?

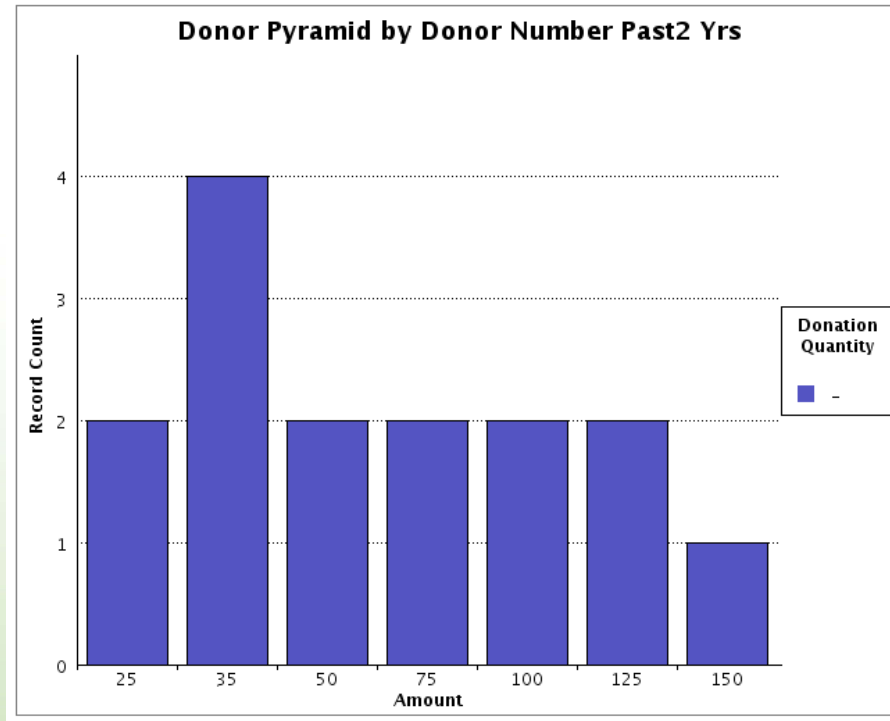
A list of donations for the past 2 years recorded by account

**An 'account' is the giving entity, either:
a household of one or more individuals
or
an organization.**

Hint: Gayle recommends looking at the past two *calendar* years for your pyramid because donors of all types thinking of their giving in calendar years.



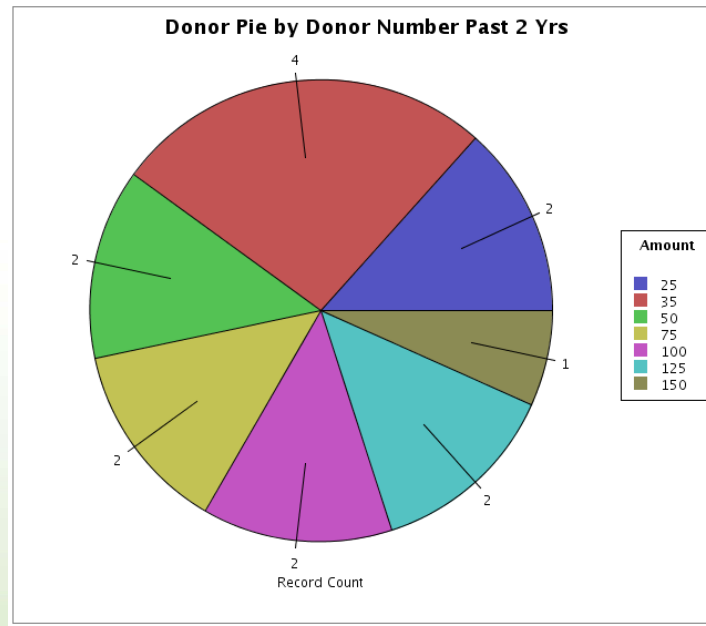
Here's A 'Donor Pyramid'



In this tiny database, the donation count pyramid is not dramatic. \$35 is the most common gift amount. Only one gift of \$150 was received. Grants were not included.



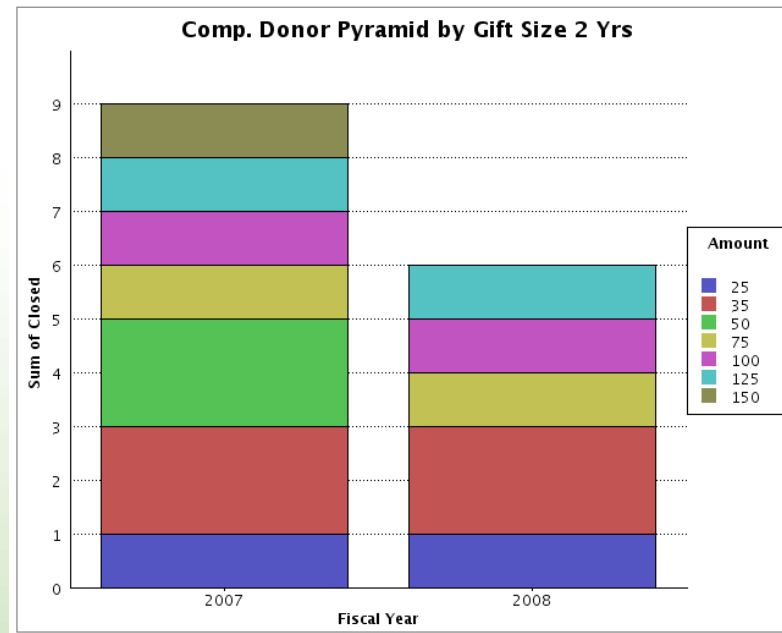
Here's A 'Donor Pie'



Here's another version of the pyramid as a 'pie'. The top four gift amounts account for less than 50% of the gift count. You also have the option to export the report from Salesforce to Excel where a more sophisticated graph can be drawn.



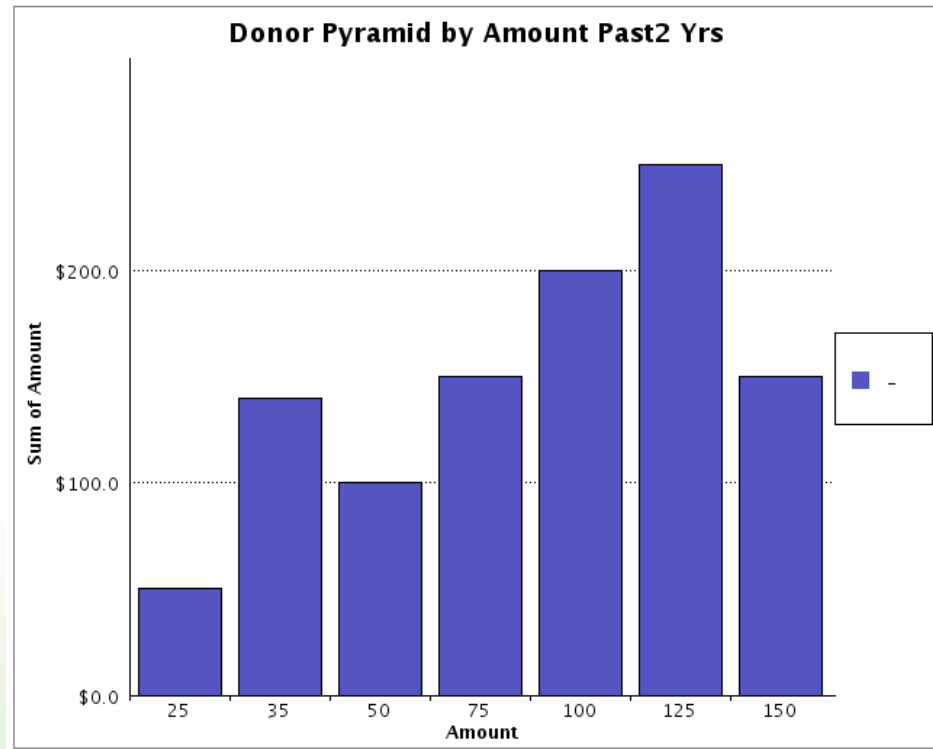
Here's A Comparative Stacked 'Donor Pyramid'



Same data, but we're getting fancier. Gift count by size is compared between two years. In 2008, there were no gifts of \$50 or \$150, but other gift counts were steady compared to 2007.



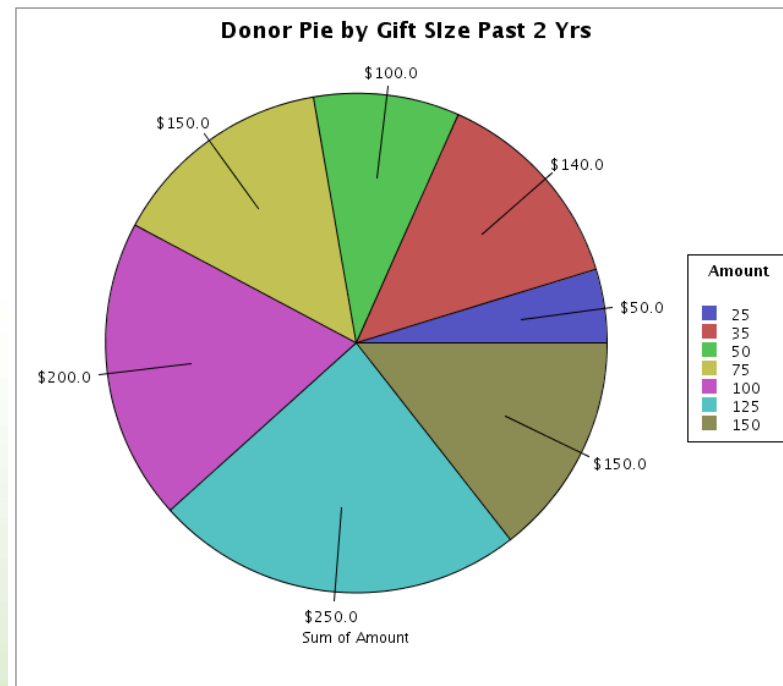
Here's Another 'Donor Pyramid'



Rather than using a tally by gift count, this pyramid uses a tally of the total dollars received by gift size. The greatest revenue, the tallest stack, came from \$125 gifts. Typically, fewer large gifts result in the majority of the donation dollars as represented by the tallest stacks in a graph of this type. However this 'pyramid' may be reversed for a grassroots organization relying on thousands of small gifts via the Internet.



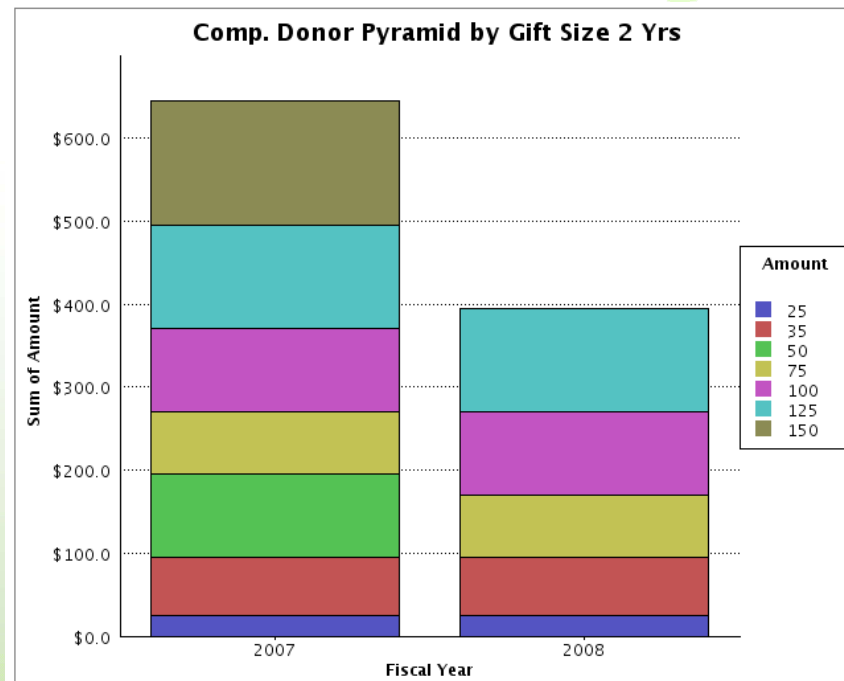
Here's The 'Donor Pie'



Here's the version of the last pyramid as a 'pie'. The top four gift amounts account for nearly 75% of the gift amount although in the earlier pie, these larger gifts were less than 50% of the gift count. What does this inform you about giving within this organization?



Here's The Comparative Stacked 'Donor Pyramid'

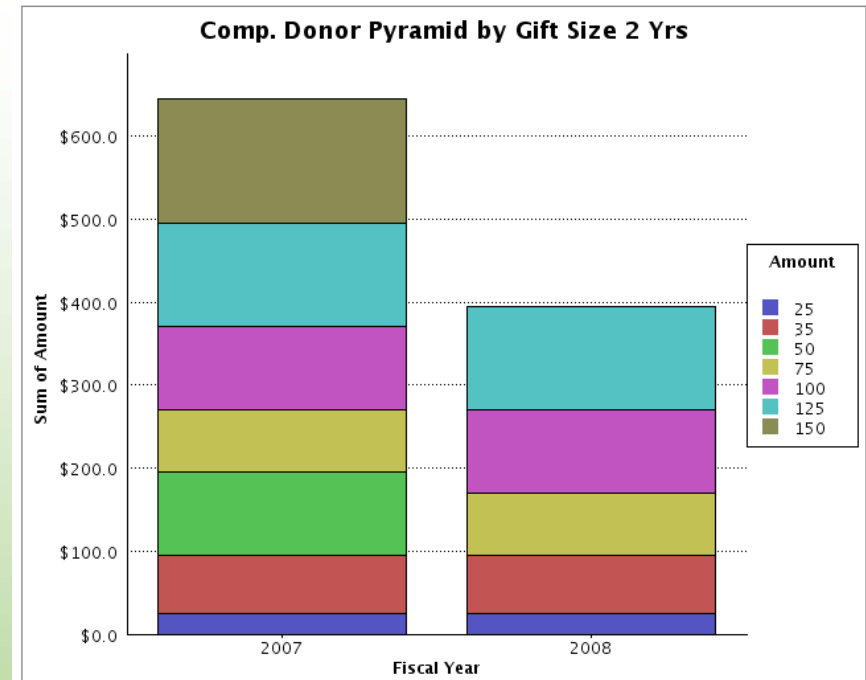
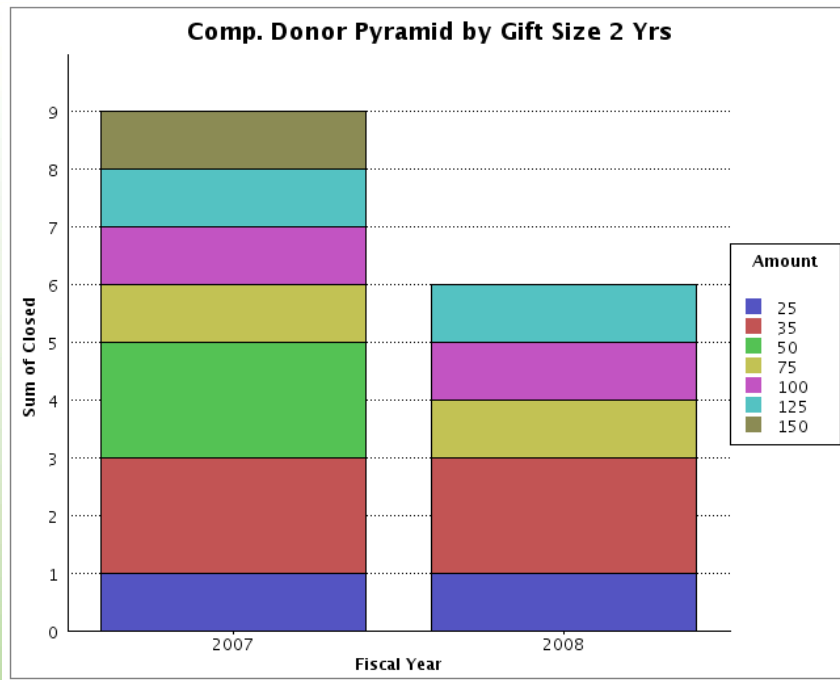


Back to fancy, with comparative stacked for 2007 and 2008, we can see that gift totals are down by over a third. This graph can't give you the 'why', but it can help generate the next questions needed to explore 'why'.



Be Inquisitive

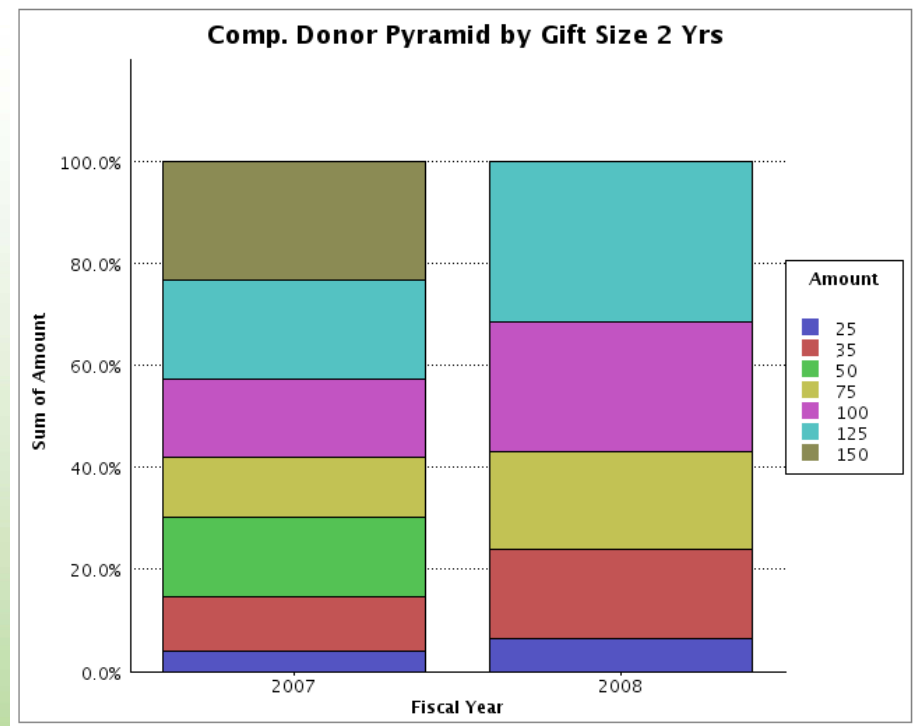
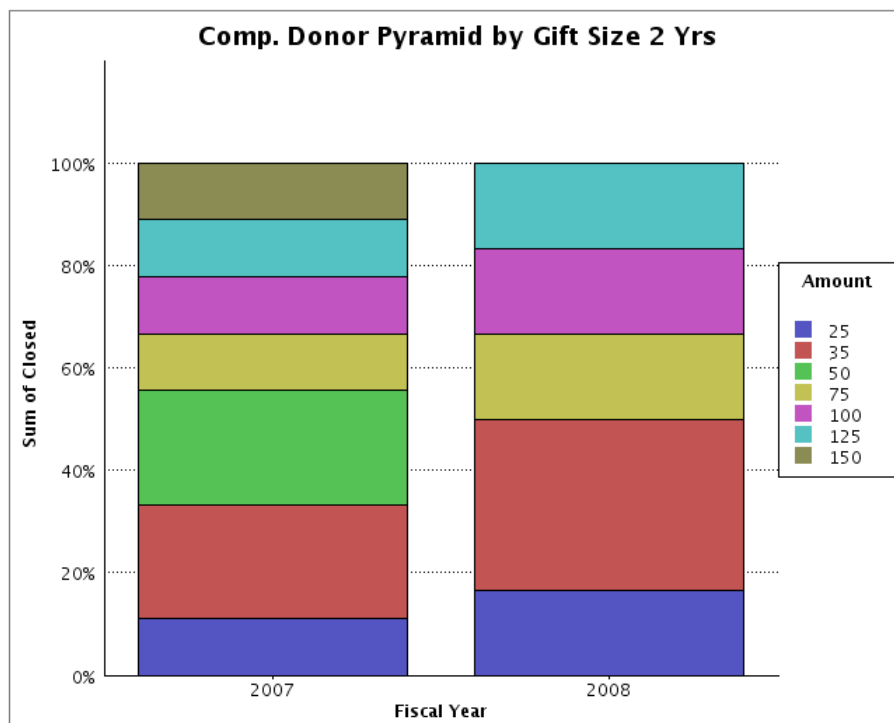
Compare Your 'Donor Pyramid's



What do you see?



Be Inquisitive - Change Up Your Pyramid's



What do you see now? Experiment to find the version that is most revealing for your data.



What's A 'LYBNT'

LYBNT stands for 'Last Year But Not This'.

If you are working on donor or member retention, these past givers are your greatest concern.

If they gave just last year, but aren't giving now, what has happened?

These givers may be your best potential givers as a percent of solicitations.

You already have their contact information; they may be relatively easy to 're-up' compared to your fundraising cost and effort.



What's A 'SYBNT'

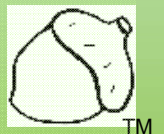
SYBNT stands for 'Some Year But Not This'.

The LYBNT donors are included in the SYBNT category.

If they gave in the past, but aren't giving now, what has happened?

All past givers may be your best potential givers as a percent of solicitations, but the more time that has past since the last donation, the less likely a donor is to re-up.

You already have their contact information, but a key question for this group – is the information accurate?



LYBNT & SYBNT

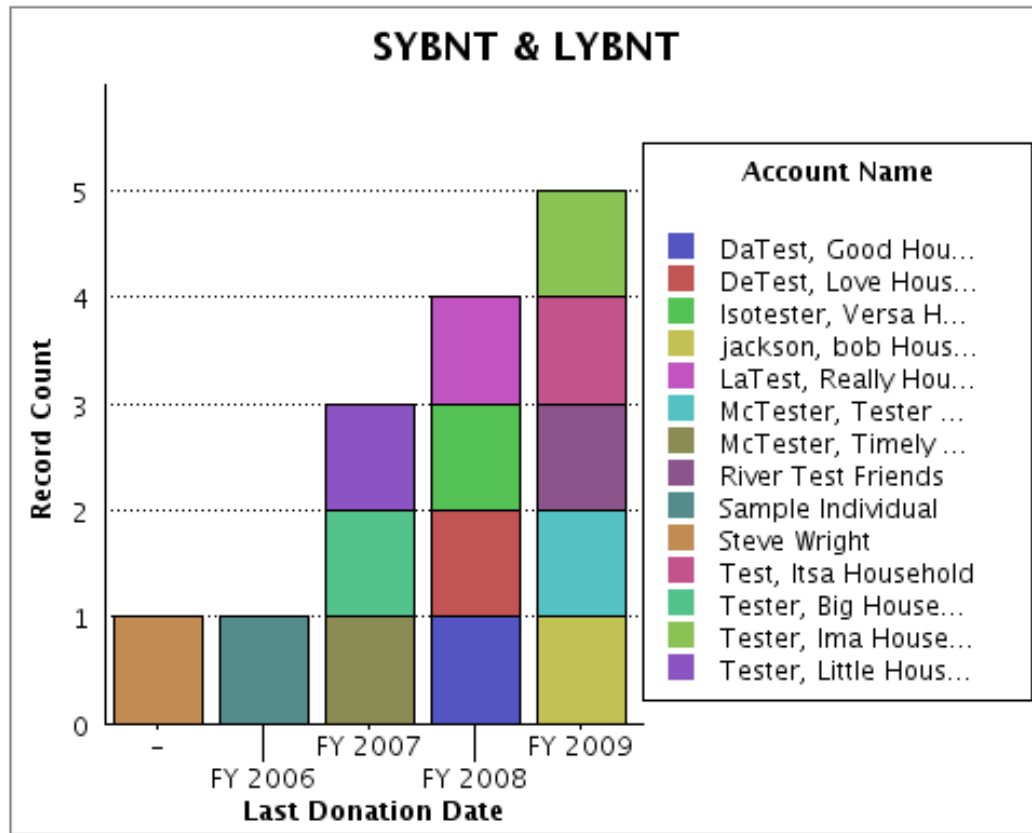
	Account Name	Record Count	Last Donation Date				Grand Total	Membershi
			-	FY 2006	FY 2007	FY 2008	FY 2009	
<input type="checkbox"/>	DaTest, Good Household	Record Count	0	0	0	1	0	1
						1		Expired
<input type="checkbox"/>	DeTest, Love Household	Record Count	0	0	0	1	0	1
						1		Expired
<input type="checkbox"/>	Isotester, Versa Household	Record Count	0	0	0	1	0	1
						1		Expired
<input type="checkbox"/>	Jackson, bob Household	Record Count	0	0	0	0	1	1
							1	Active
<input type="checkbox"/>	LaTest, Really Household	Record Count	0	0	0	1	0	1
						1		Expired
<input type="checkbox"/>	McTester, Tester Household	Record Count	0	0	0	0	1	1
							1	Expired
<input type="checkbox"/>	McTester, Timely Household	Record Count	0	0	1	0	0	1
					1			-
<input type="checkbox"/>	River Test Friends	Record Count	0	0	0	0	1	1
							1	-
<input type="checkbox"/>	Sample Individual	Record Count	0	1	0	0	0	1
				1				Expired
<input type="checkbox"/>	Steve Wright	Record Count	1	0	0	0	0	1
			1					-
<input type="checkbox"/>	Test, Itsa Household	Record Count	0	0	0	0	1	1
							1	Active
<input type="checkbox"/>	Tester, Big Household	Record Count	0	0	1	0	0	1
					1			-
<input type="checkbox"/>	Tester, Ima Household	Record Count	0	0	0	0	1	1
							1	-
<input type="checkbox"/>	Tester, Little Household	Record Count	0	0	1	0	0	1
					1			Expired
	Grand Total	Record Count	1	1	3	4	5	14

This report could include additional info such as donation date and amount, donor name and address etc. so that it could be used in a mail merge based solicitations. In this version, membership status is shown. But for this organization, membership is a loose concept. There are many donors who are not 'members'. There are members who never give outside of membership renewals. In such an organization, it may be helpful to further sort reports and solicitations so that donor communications are more specifically targeted.

Here's a report that includes LYBNT and SYBNT in a single Salesforce report. They could also be split out into separate reports.



LYBNT & SYBNT



Just like the donor pyramids, LYBNT and SYBNT can be shown for record count or donation amount.

Good news - 5 donors already gave in 2009.

One donor is missing a donation date – check on this!
More to do – look more closely at these 2008 donors – do they usually give just at year end?
Change up – set the report parameters to look instead for those not giving in past 12 months from the current date.

Here's the graph that was part of the previous report of LYBNT and SYBNT. In Salesforce, this can easily be split out into separate reports.



Final Thoughts on Data



The remaining reports are extremely easy to generate with any CRM system, though it may be impossible to go back to previous years if the data has not been kept or not been entered into your system.

Even without CRM software, it may be possible to calculate these giving patterns. Graphs can be produced in Excel.

It may be necessary to contact several organization resources for information on the budget, spending and other details.

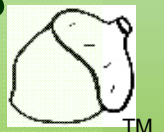


Final Thoughts on Data



Even in Salesforce, your organization should consider adding additional fields to improve your record keeping such as: join date, lapsed date, member categories and informal name fields – but only fields that will be actively used and maintained.

Salesforce and other CRM programs expand your view of the donors when they also capture volunteer, purchases, campaign and event information which was not in the scope of this workshop.





The End

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