

[NFG Masterclass Webinar] Donor Retention Series:
**5 Tips to Building Stronger Donor
Engagement and Raising More
Money**

**Guest Speaker: Barbara O'Reilly, CFRE
Principal, Windmill Hill Consulting**

Follow the conversation:

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“ In preparing for battle I have always found that plans are useless, but planning is indispensable ”

▪

–General Dwight D. Eisenhower

Competitive Landscape



Limited Staff Bandwidth



Uncertain Times



Constantly Going But Not Making Progress



Retention is Everyone's Problem...



50% in 2008 to...

And it's getting worse...

AVERAGE

46%



FIRST-TIME

23%



REPEAT

60%



MONTHLY

90%



Focus on What's Realistic to Raise



Long-Term Planning = Sustainability





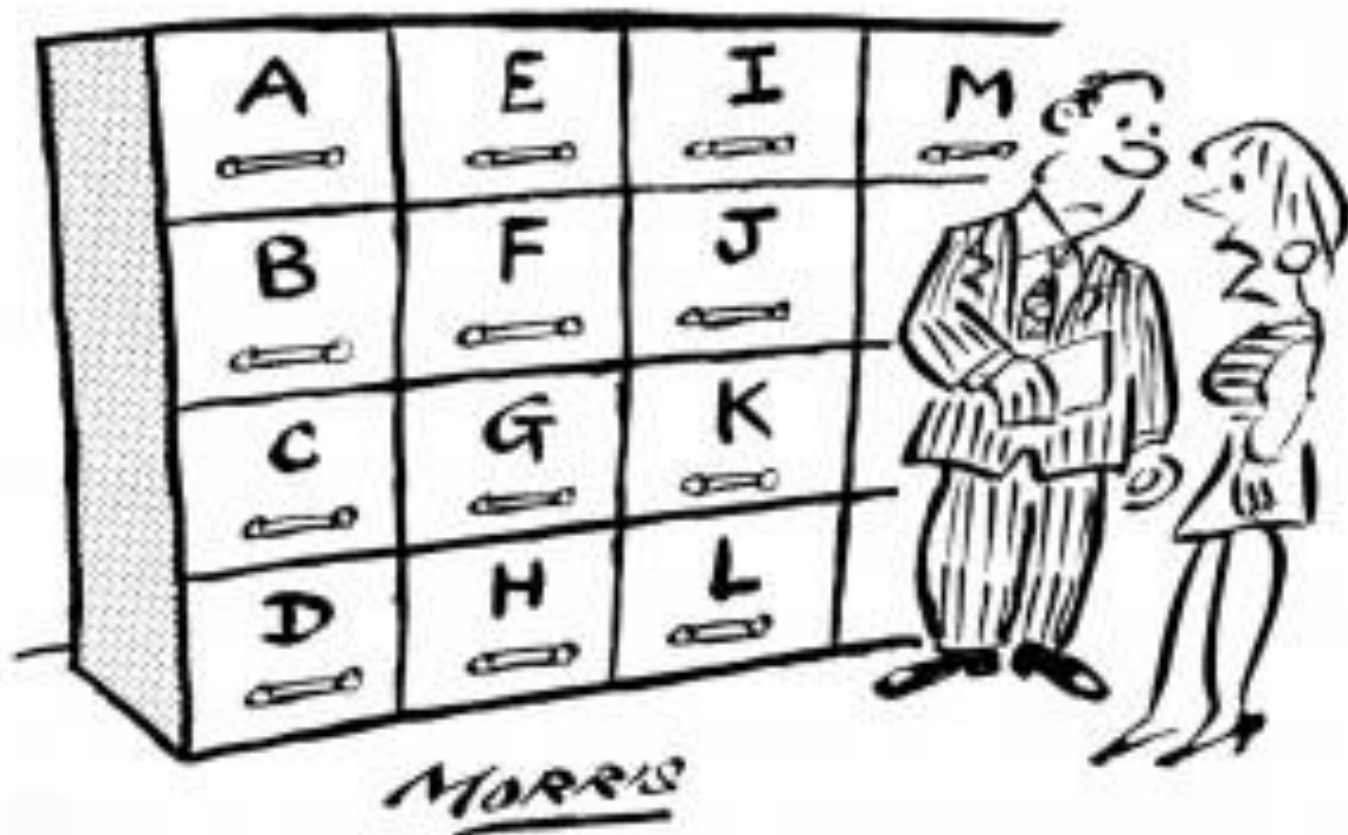
A goal without a plan is just a wish.”

— Antoine de Saint-Exupéry



Created by Stefano Vetere
from Noun Project

- ✓ **Did you raise what you needed each year?**
- ✓ **Did you reach your fundraising goals each year?**
- ✓ **What's your donor retention rate and average gift amounts?**
 - ✓ **Are they going up? Down? Staying the Same? You Don't Know?**
- ✓ **What are your revenue sources?**



"I'd love to work here - but first you'll have to get a computer and some database software."

Lay the Foundation for Tomorrow

Set the Stage for Major Gifts

Create Donor Engagement

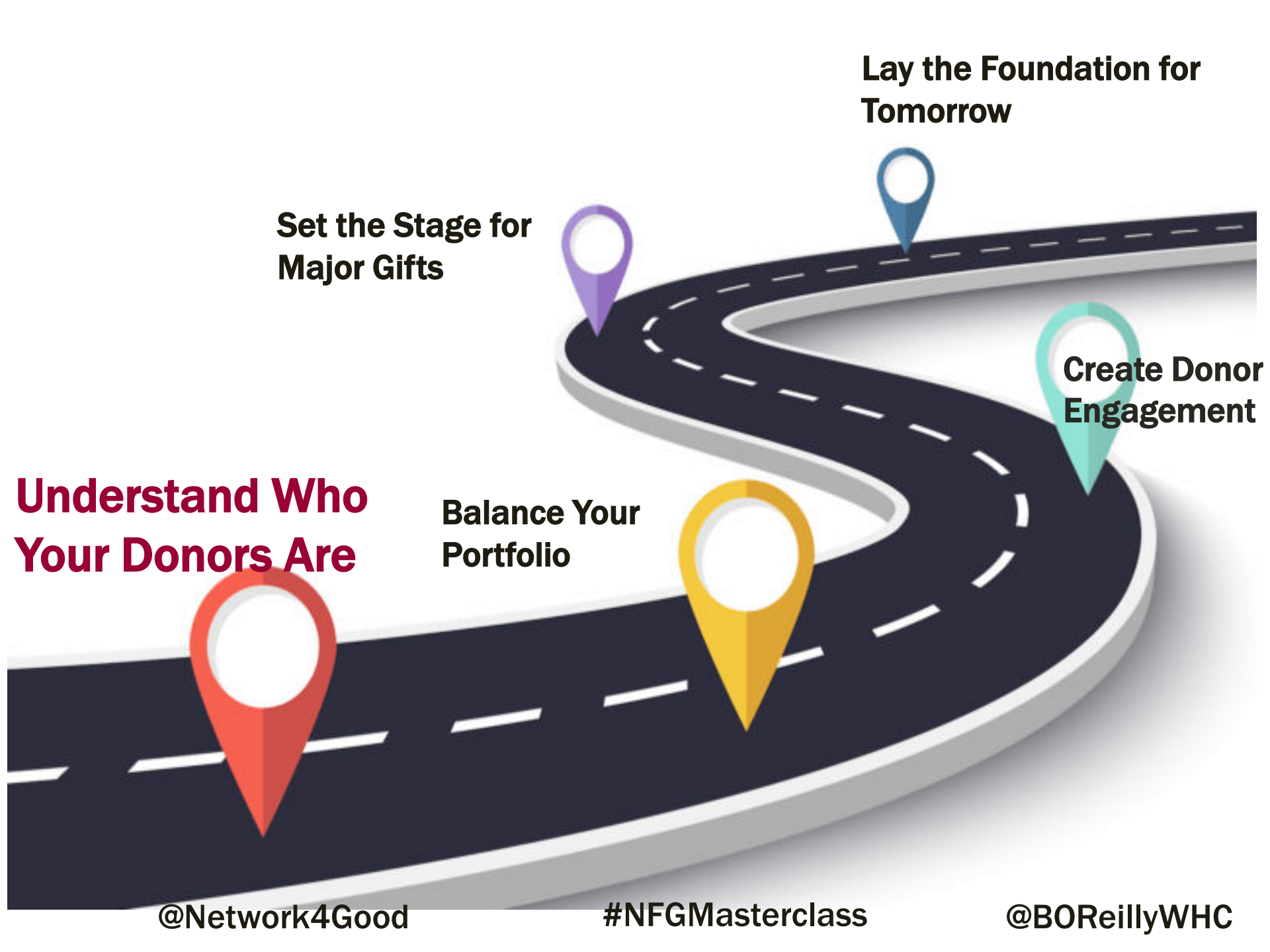
Balance Your Portfolio

Understand Who Your Donors Are

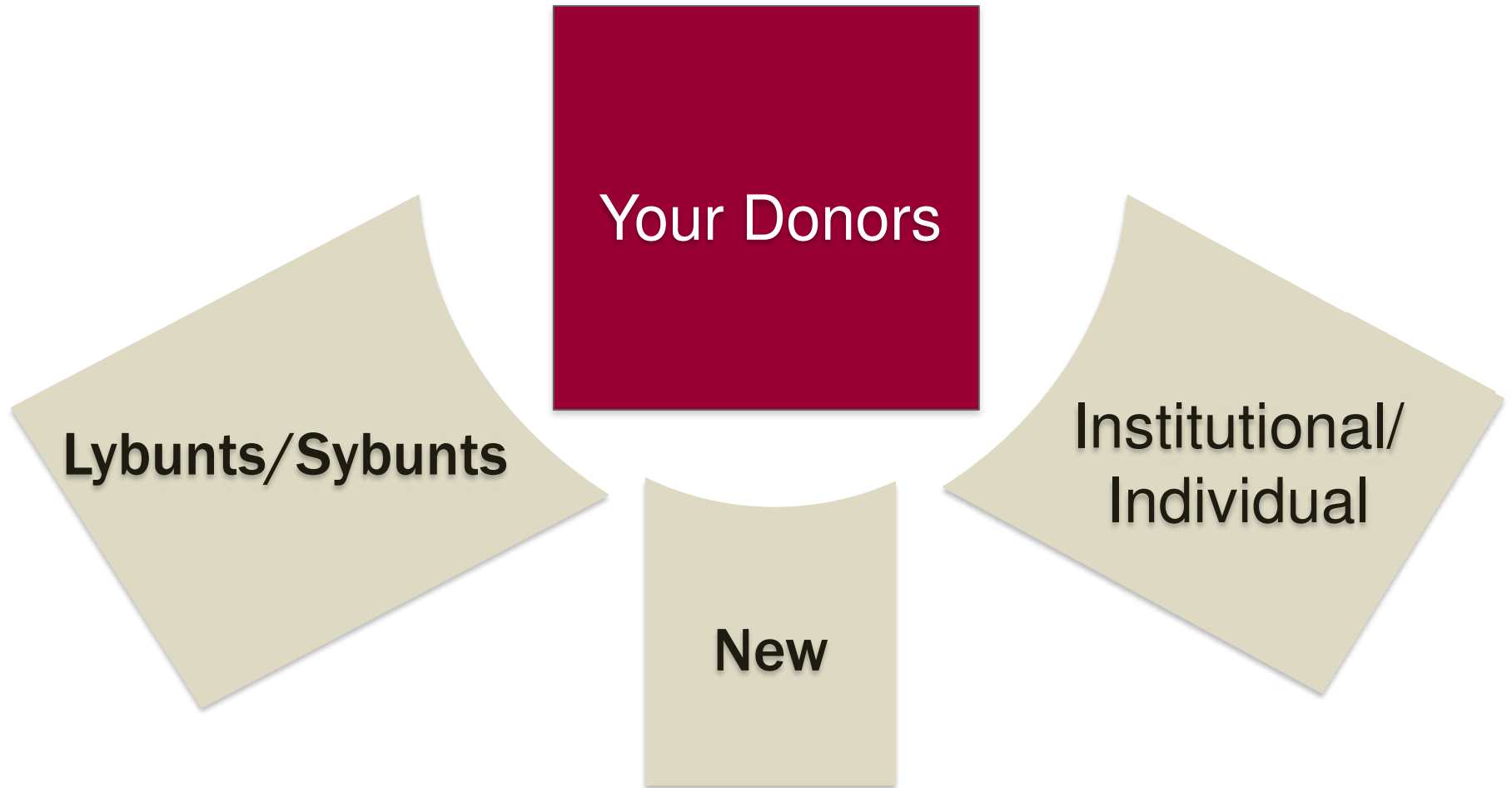
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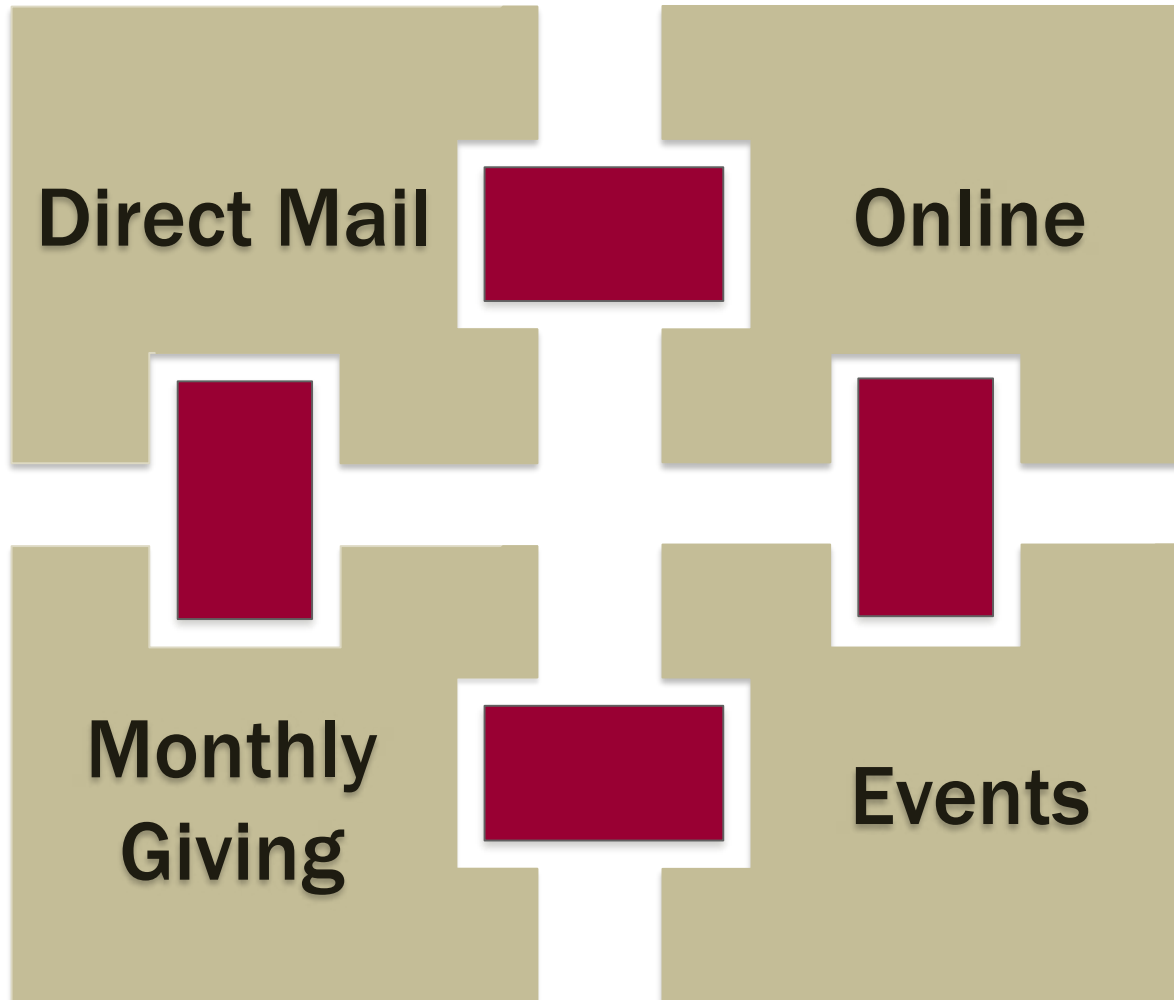
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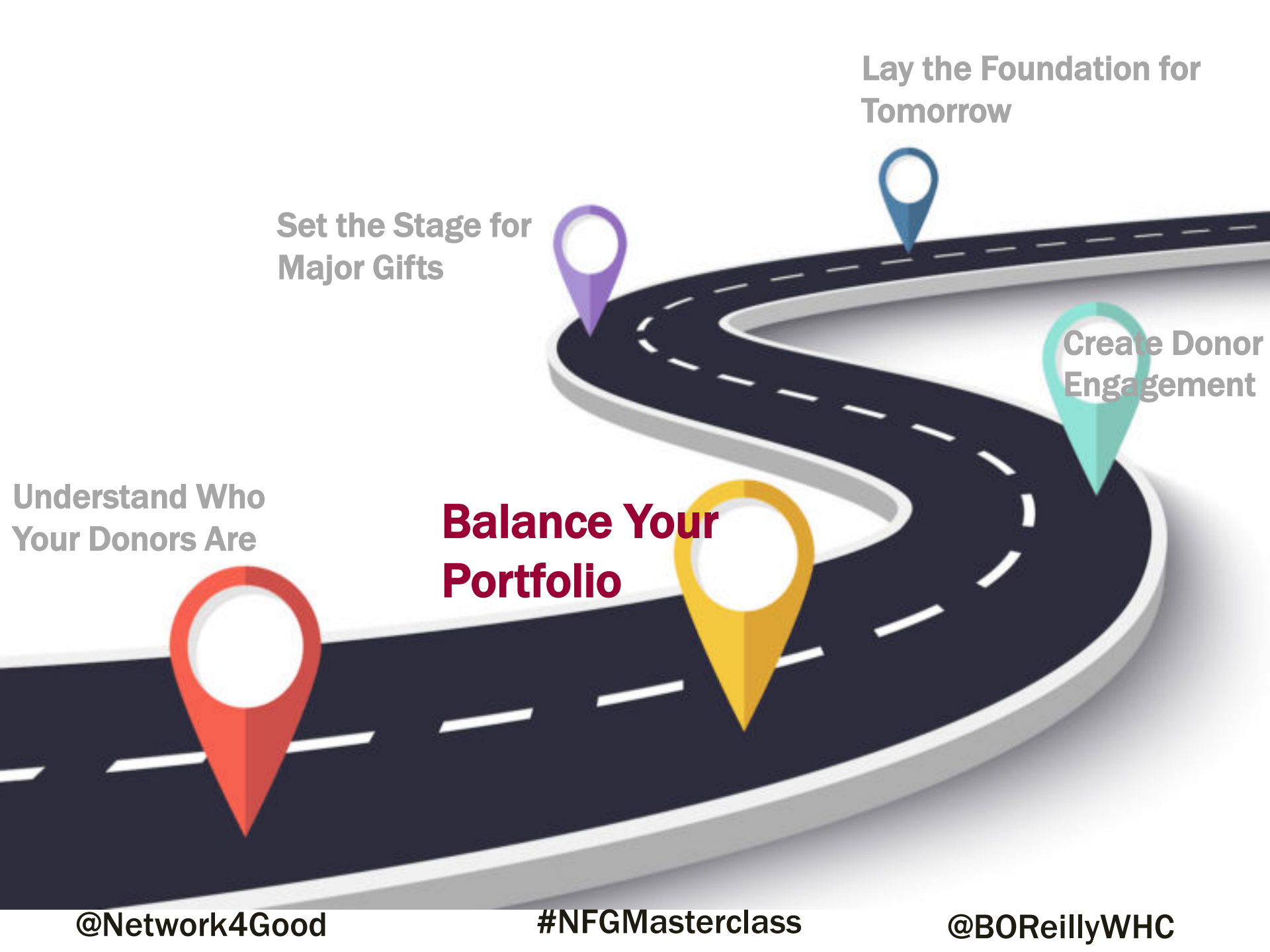


Look at How You Are Raising Money



Get to Know Your Donors





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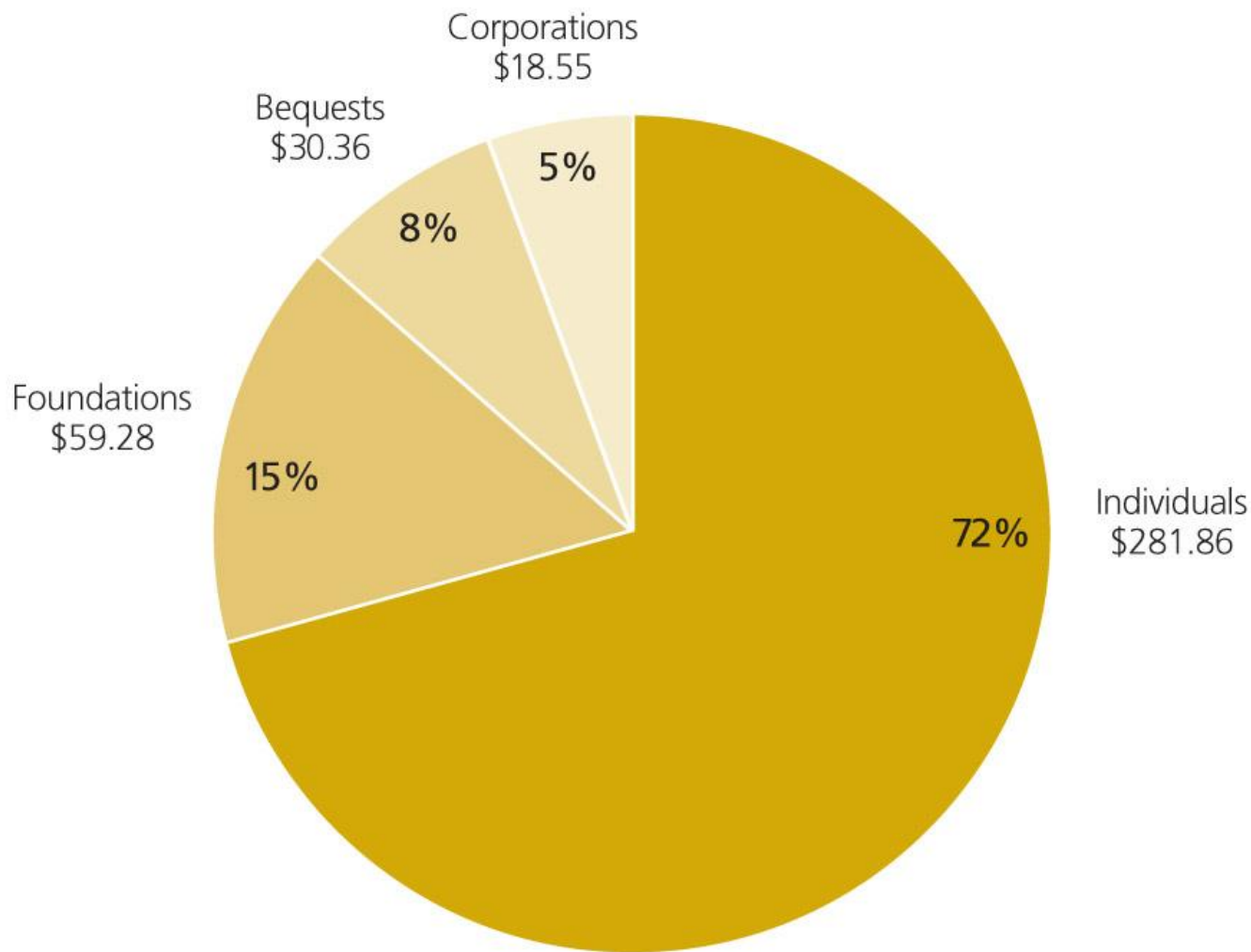
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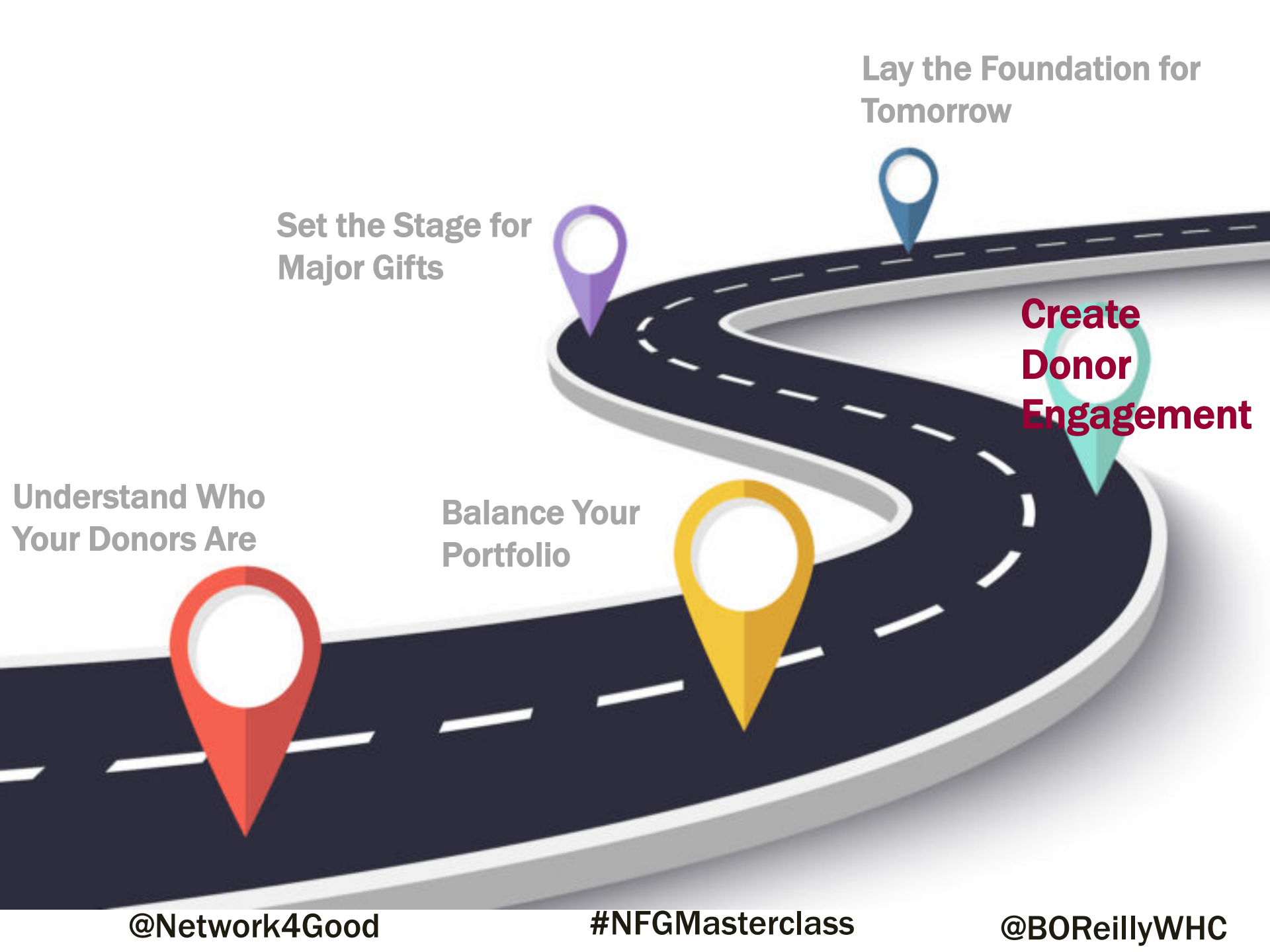
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2016 contributions: \$390.05 billion by source (in billions of dollars – all figures are rounded)



Balance Your Portfolio





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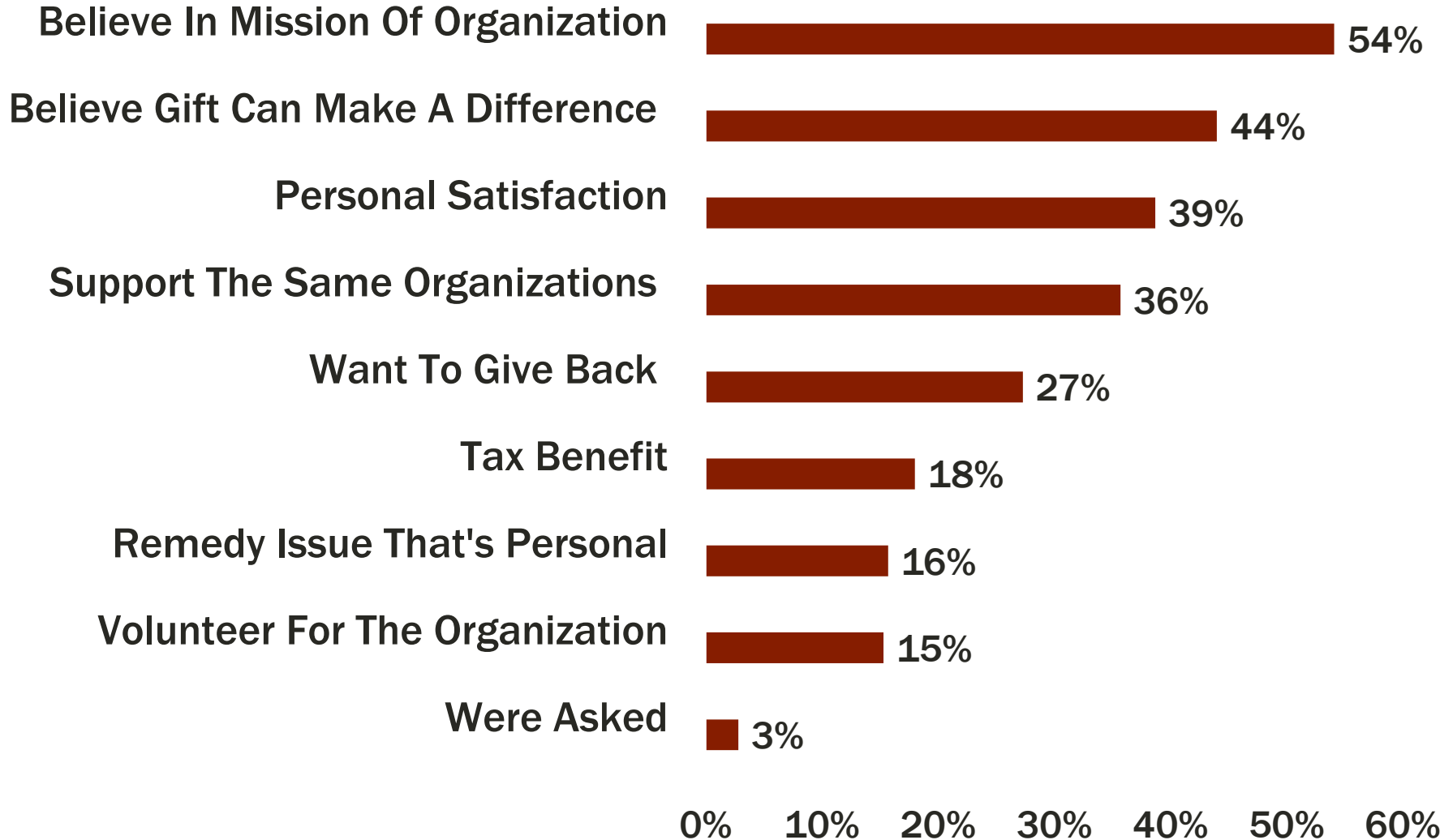
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Why Do Donors Give?



Source: 2016 U.S. Trust® Study of High Net Worth Philanthropy

**Fundraising under-performance,
therefore, is actually a failure to
communicate.”**

**—Penelope Burk, *Donor-Centered
Fundraising***



What does this trust exercise teach us? Never take your donors' support for granted."

Tell Your Donors They Made A Difference

Personal stories
or letters from
beneficiaries

E-Newsletters

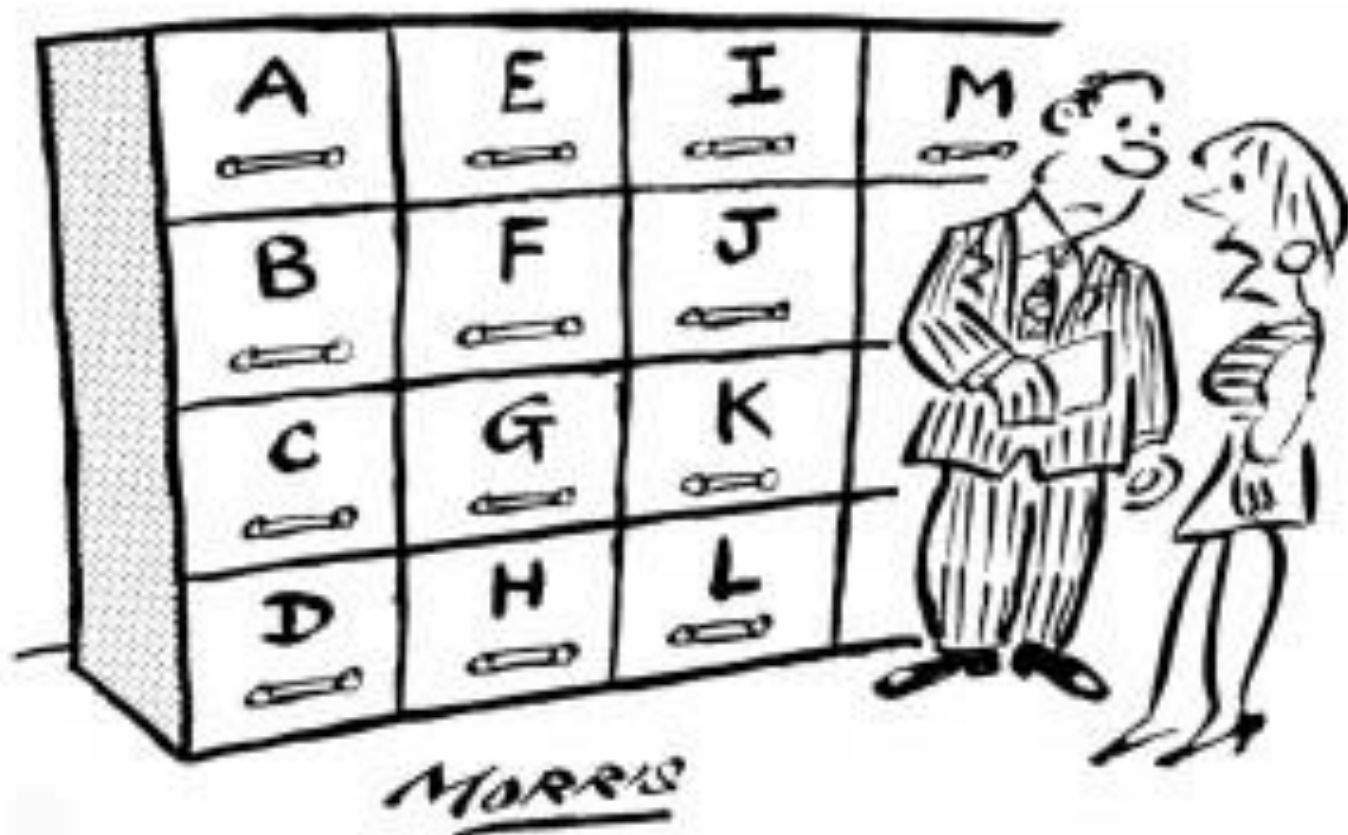
Pictures—tell
1,000 words

Stories of
success and
failures

1:1 Staff Visits
or CEO
conference calls

Virtual Site
Visits

Videos

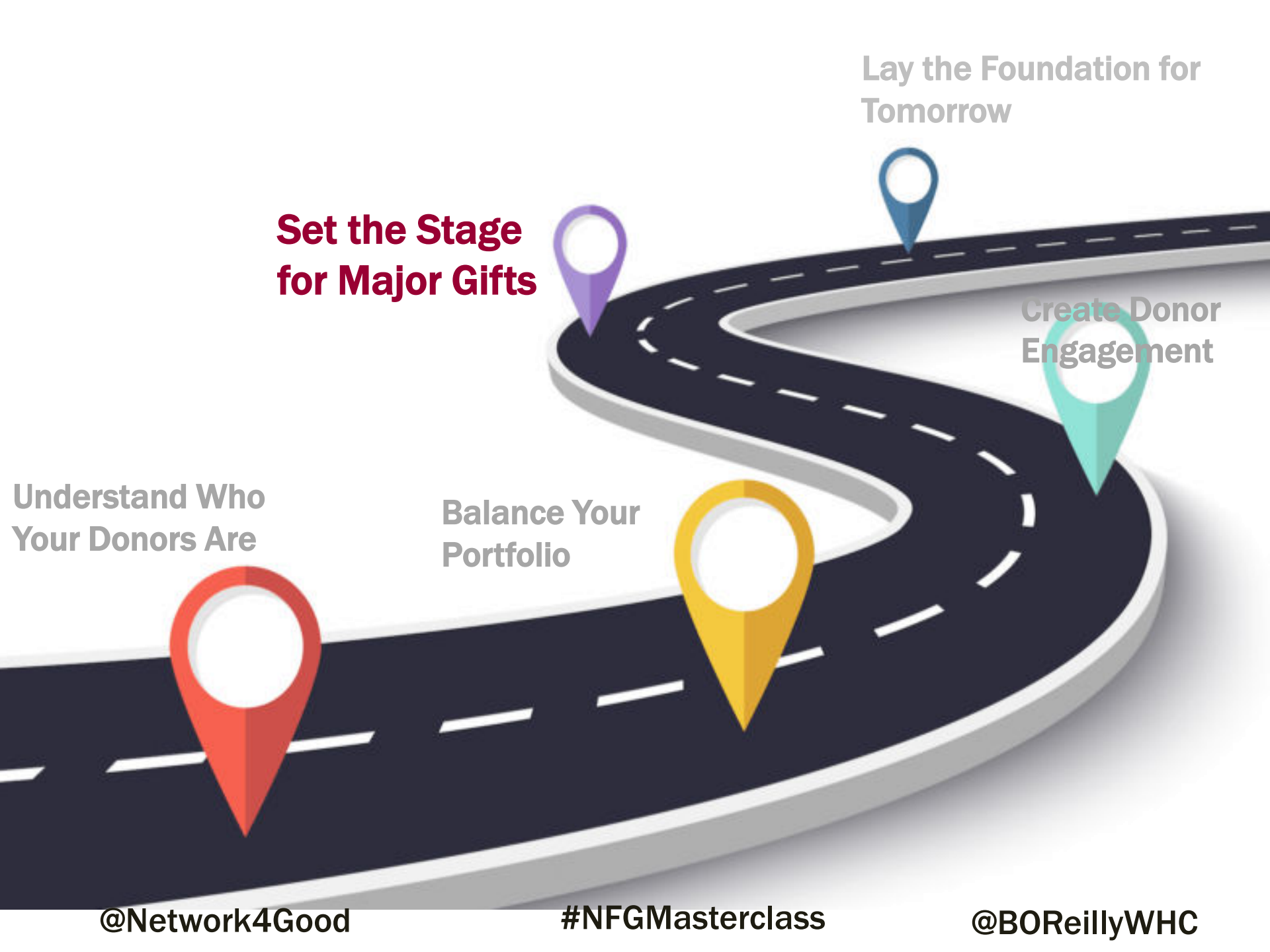


"I'd love to work here - but first you'll have to get a computer and some database software."

“ I’VE LEARNED THAT PEOPLE WILL FORGET
WHAT YOU SAID, PEOPLE WILL FORGET WHAT
YOU DID, BUT PEOPLE WILL NEVER FORGET
HOW YOU MADE THEM FEEL. ”

-Maya Angelou





**Set the Stage
for Major Gifts**

Lay the Foundation for
Tomorrow

Create Donor
Engagement

Understand Who
Your Donors Are

Balance Your
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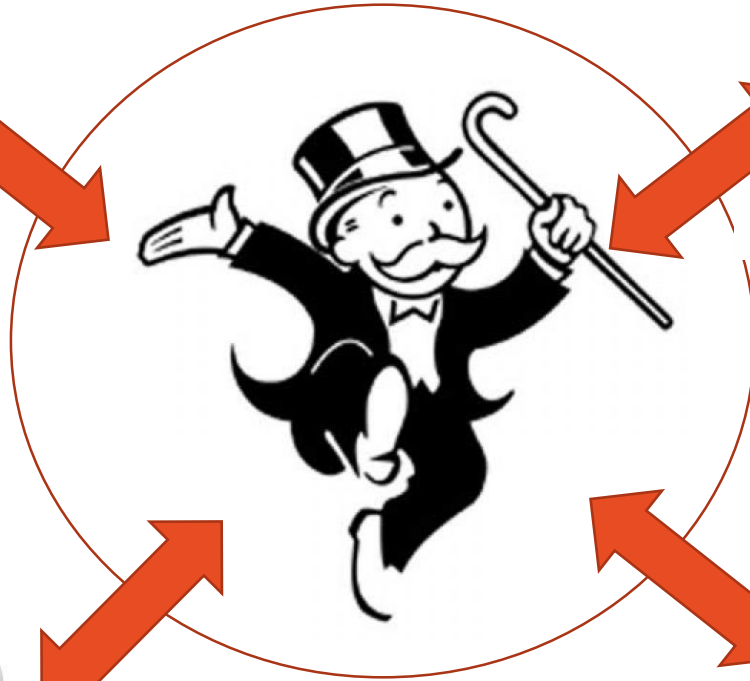
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FAIRY TALES FOR BOARD MEMBERS



Tell Your Donors They Made A Difference



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Social Media
Followers

Opt-in for your
communications

Past Event
Attendees

Networks for
Boards and
Volunteers

Direct Mail
Acquisition



**“If you don't
know
where you
are going,
you'll end
up
someplace
else.”**

— Yogi Berra

Set Your Goals By Revenue Type

	Revenue	Current FY To Date	Current FY Goal	Total FY17	Total FY16
Annual Giving	Direct Mail				
	E-solicitations				
	Monthly Donors				
	Leadership Society				
Major Gifts	Solicitations				
Foundations	Grant Proposals				
Corporations	Corporate Partners Program				
Events	Special Event 1				
	Annual Gala				
Total					

Set Goals Besides Dollars Raised

Volunteer Accountability

- Board participation rates
- Volunteer giving

Test strategies to acquire new donors

- Launch planned giving society

Upgrade Current Donors

- Monthly giving program

Use Communications

- Improve email open rates
- Grow direct mail response rates

Details Add Finishing Touch



Objectives

Measurable steps to achieve the goals you set



Strategies

Actual actions to reach objectives



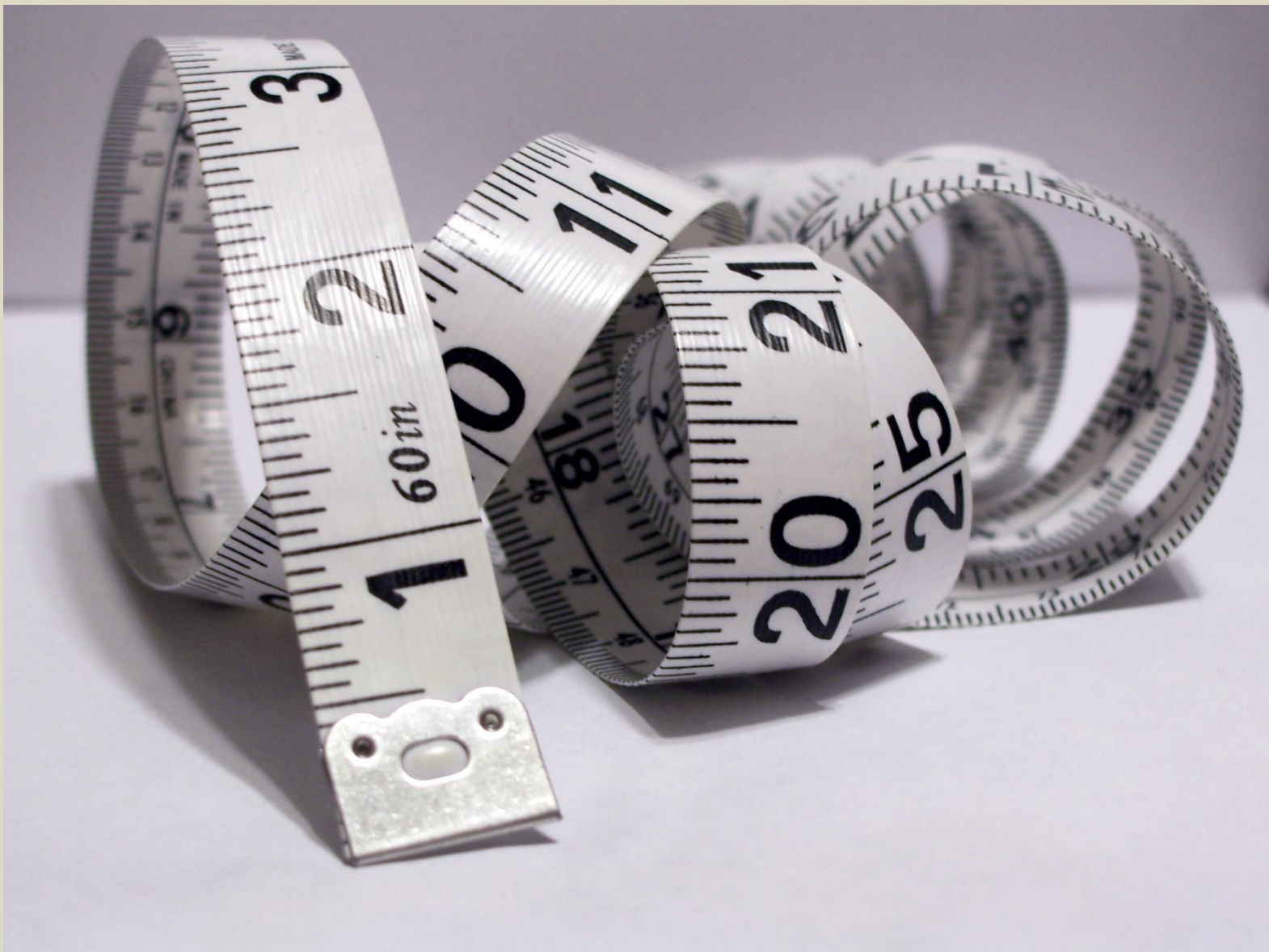
Timeline and Owners

Who needs to be involved and what key dates are important?

Details Add Finishing Touch

Sample

		Owner	Income	Expenses
Goal	Increase long-term fundraising results for XXX			
Objective	Grow major gift fundraising by XX% over FYXX			
Tasks	Review XXX Results			
	Segment \$2,500-\$10,000 donors for rating and personal strategy development			
	Hold Screening Session to rate and qualify new prospects			
	Develop MG pipeline of FY XX solicitations to be managed by MGO			
	Schedule series of cultivation onsite breakfasts			
	Involve Development Committee/Board in MG prospect cultivation			



“What gets measured, gets improved.”

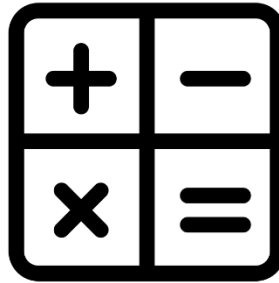
–Peter Drucker

What's Your Fundraising Effectiveness?



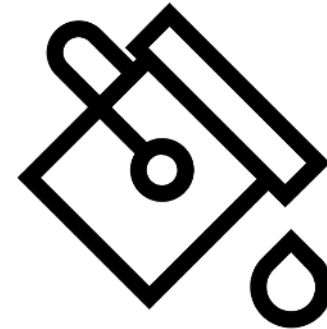
CTRD

How much are you spending versus raising?



Average Gift

- Increase means growing engagement by donors.
- Raise average gift by focusing on larger annual donors.



Donor Retention

- How many of your current donors are you keeping?
- How many first-time donors give a second gift?

Remember...

- ✓ **SIMPLE**
- ✓ **Manageable**
- ✓ **Donor Retention**
- ✓ **Multi-channel and Donor-Centered**
- ✓ **Focus on Best ROI like Major Gifts and Planned Giving**





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