



# Next Steps: How to Keep Year-End Donors and Get the Next Gift

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Presented By: Steven Shattuck, Bloomerang  
Tuesday, January 25, 2022 | 2:00 – 3:00 p.m.



# A little housekeeping...



*We're recording this webinar!*

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



*Feel free to ask questions!*

Use the Questions chat box to ask your questions.  
We will have a Q&A session at the end of the presentation.



*We will be live-tweeting!*

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**Raise More, Manage Less**

**Donation Forms | Event Registration  
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Integrations & Data**



**Donor Database | Fundraising  
Reporting | CRM**

# Today's Speaker



## **Steven Shattuck | Chief Engagement Officer, Bloomerang**

A prolific writer and speaker, Steven curates Bloomerang's sector-leading educational content and hosts their weekly webinar series which features the top thought leaders in the nonprofit sector. He volunteers his time on the Project Work Group of the Fundraising Effectiveness Project and the Study Fundraising Steering Group at the Hartsook Centre for Sustainable Philanthropy at Plymouth University. He's contributed content to the National Council of Nonprofits, AFP, NTEN and Nonprofit Hub, and is a frequent conference speaker. He's also the author of *Robots Make Bad Fundraisers – How Nonprofits Can Maintain the Heart in the Digital Age* published by Bold and Bright Media (2020).

# What Every Fundraiser Can Do To Retain Year-End Donors



# About Presenter »

Steven Shattuck

Chief Engagement Officer, Bloomerang

Author: Robots Make Bad Fundraisers

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
- prefers tea to coffee
- allergic to rhubarb
- won the David Letterman scholarship



# A study of donor retention »

## ⇒ FUNDRAISING EFFECTIVENESS *project*



176 million transactions from more than 20,000 organizations and \$80 billion in donations since 2005.

<http://afpfep.org>

# Donor retention »

**AVERAGE**  
43.6%



**FIRST-TIME**  
19.3%



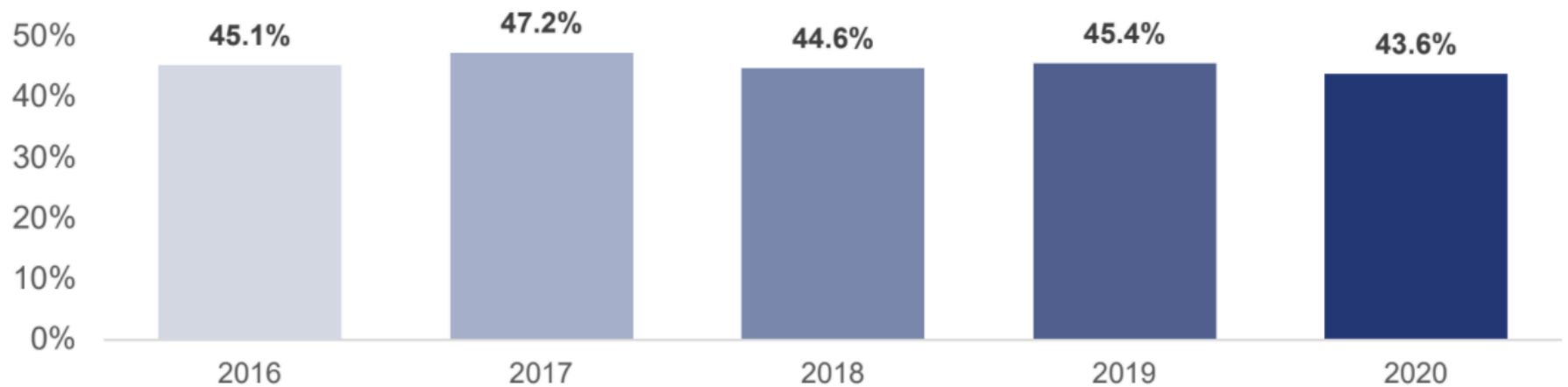
**REPEAT**  
59.6%



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

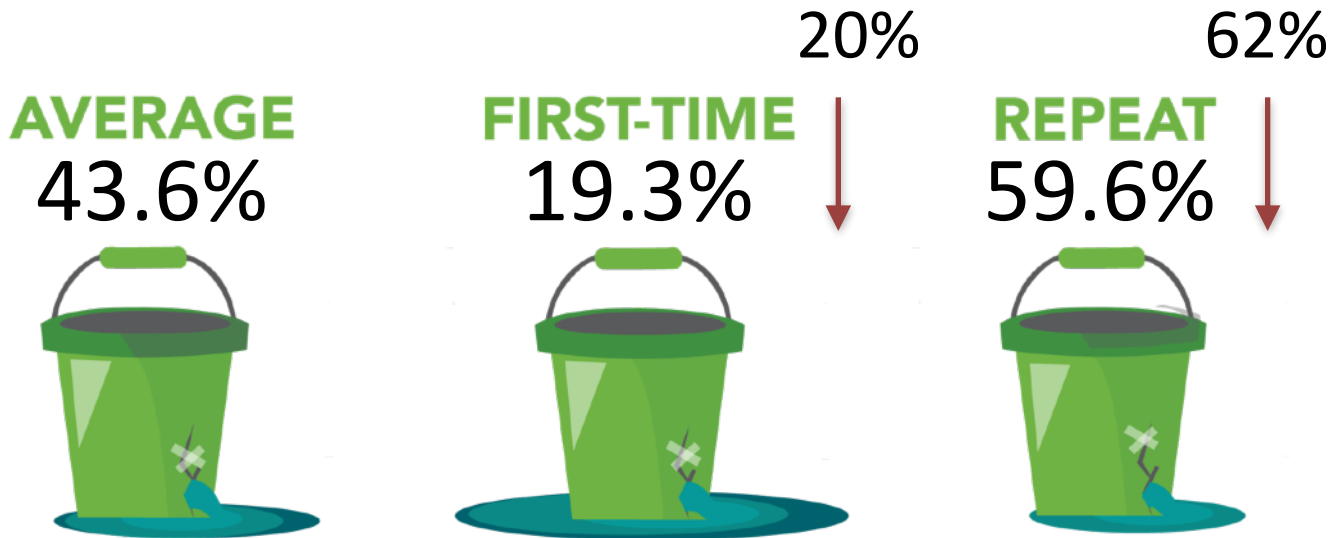


# Donor retention over the years »



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

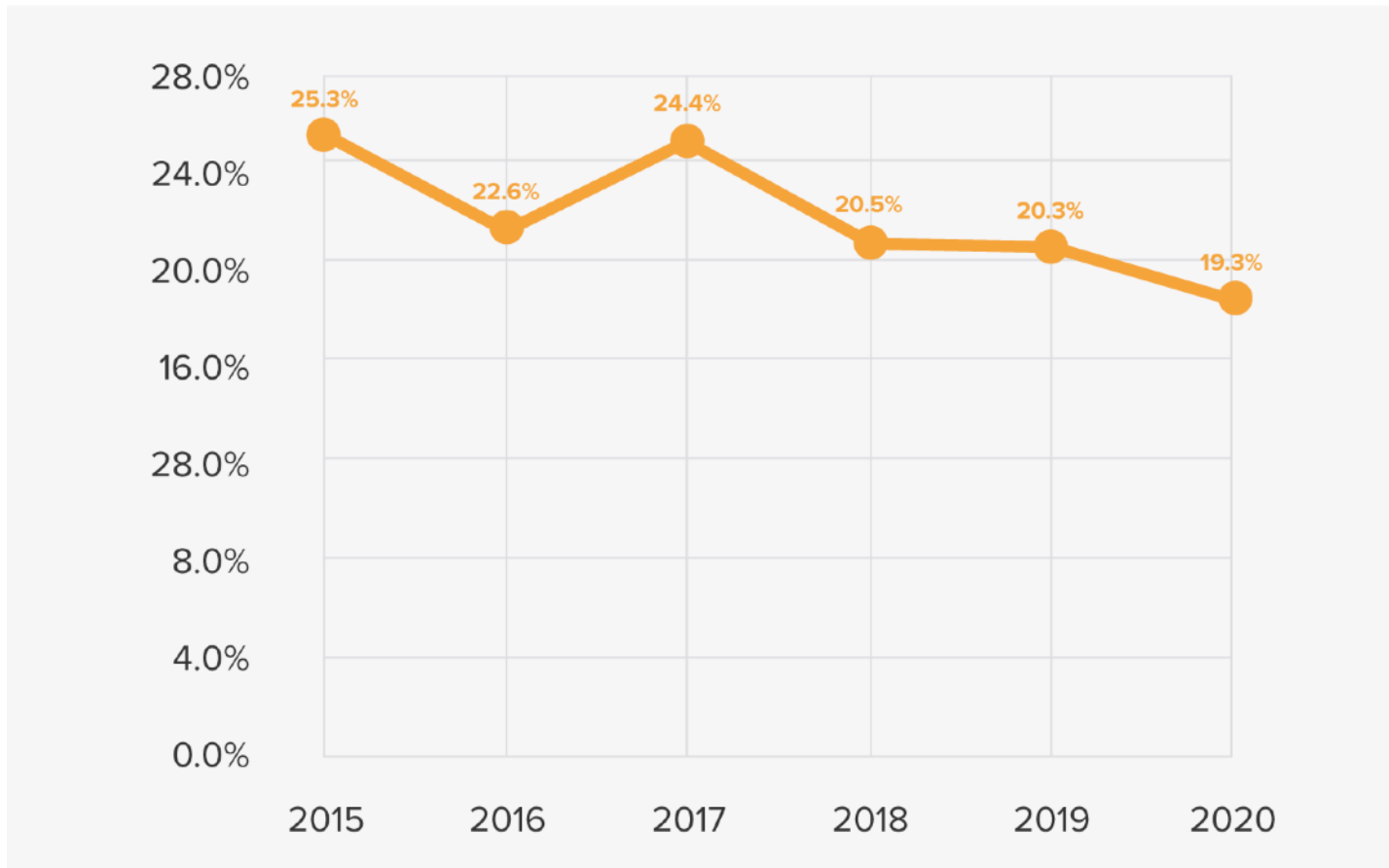
# Donor retention »



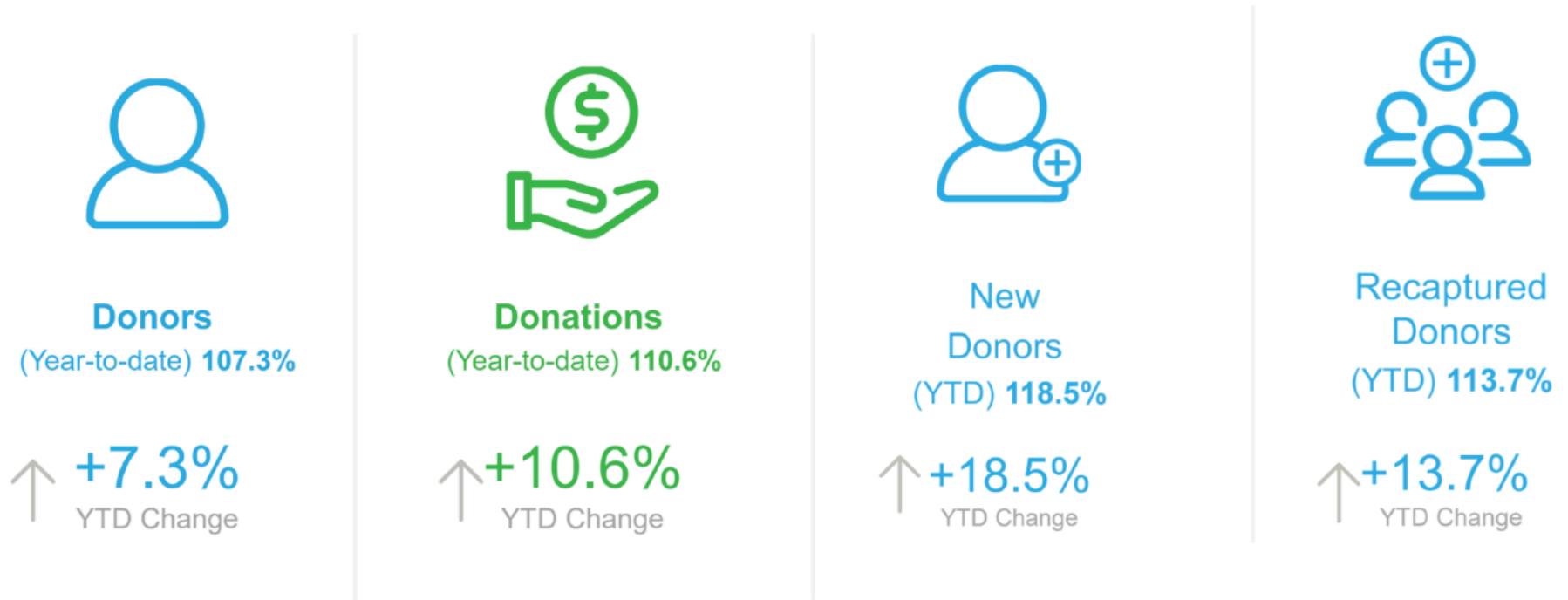
Source: Fundraising Effectiveness Project <http://afpfep.org>

# However... »

## New Donor Retention Rate YoY



# There was some good news »

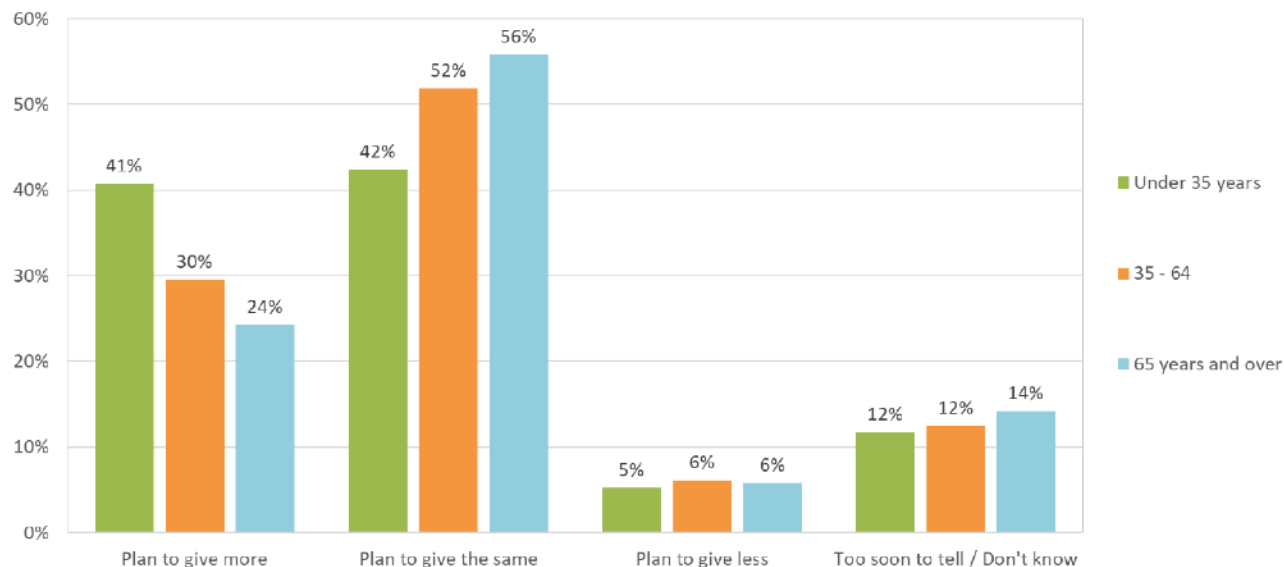


Overall giving increased by 10.6% in 2020 as compared to 2019, spurred by an increase in new and reactivated donors.

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

# 2021 expectations »

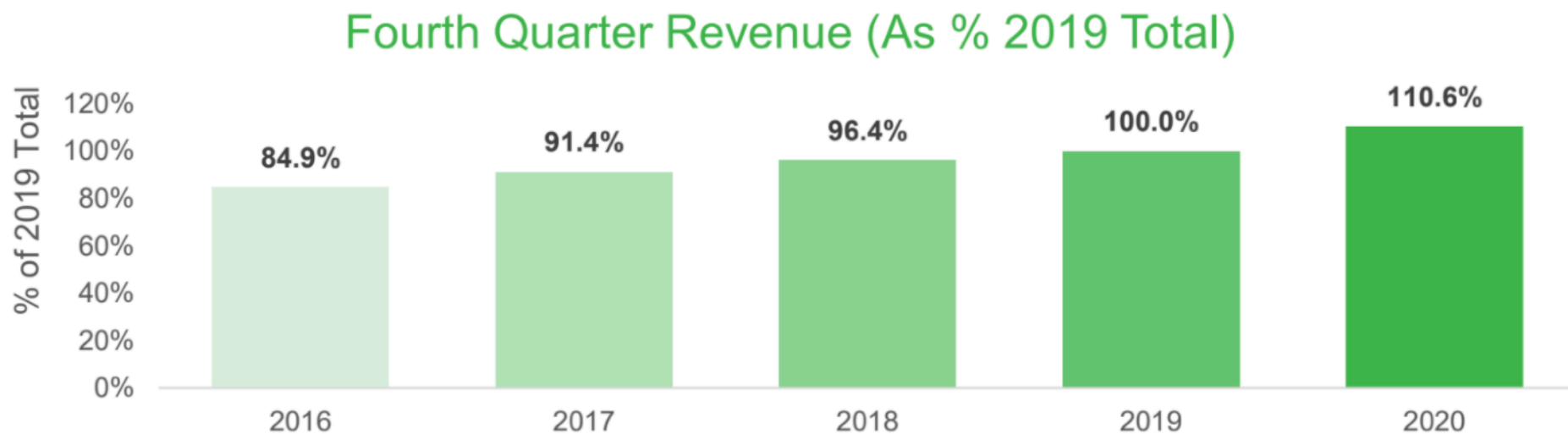
**A majority of respondents (53%) expects to give about the same this year as they contributed in 2020.** The ratio is more than 4:1 for donors who plan to give



more (26%) than less (6%), an improvement over our previous Survey. **Once again, donors under 35 years of age are most likely to say they plan to give more in 2021 than they gave last year (41%).**

<http://www.cygresearch.com/>

# Q4 has the most to retain »



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

# Donor retention math »

**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**

# Impact of improving 1st-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



# Why do donors leave?

# Why nonprofit donors leave »

- 2001 study by Adrian Sargeant
- Survey to lapsed donors of 10 major U.S.-based nonprofits
- Respondents were asked to check each reason for stopping their contributions



[http://www.campbellrinker.com/Managing\\_donor\\_defection.pdf](http://www.campbellrinker.com/Managing_donor_defection.pdf)

# Why nonprofit donors leave »

- 5% - thought charity did not need them
- 8% - no info on how monies were used
- 9% - no memory of supporting
- 13% - never got thanked for donating
- 16% - death
- 18% - poor service or communication
- 36% - others more deserving
- 54% - could no longer afford

[http://www.campbellrinker.com/Managing\\_donor\\_defection.pdf](http://www.campbellrinker.com/Managing_donor_defection.pdf)

# Why do donors stay?

# 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-and-proof-of-link-between-donor-attitudes-and-behavior/>

# Key drivers of donor commitment »

1. Donor perceives organization to be effective
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

<http://www.thedonorvoice.com/national-donor-commitment-study-and-proof-of-link-between-donor-attitudes-and-behavior/>

# How to increase retention »

- Thank quickly + personally
- Illustrate that you know who the donor is
  - Segment communications
- Tell them how gifts are used / will be used
- Tell them what comes next
- Keep lines of communication open
  - Solicit feedback
- Prioritize monthly giving



# Data Segmentation Powers Stewardship





# Who are your year-end donors? »

- Frequency:
  - First gift?
  - Second gift?
  - New monthly donor?
  - Existing monthly donor?
  - Multiple one-time gifts?
- Channel:
  - Direct mail?
  - Online?
  - Event?
- Campaign:
  - Thanksgiving?
  - Giving Tuesday?
  - Hanukkah?
  - Christmas?
  - Year-End?
- Gift amount:
  - How much did they give?
  - Was it an upgrade or a downgrade?
  - Was it above or below your average gift size?
- Reason for giving:
  - Why did they give?
  - What do they care about?
  - Specific fund designation?

	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)	

## Heather Carroll

Executive Director at Skaneateles Education Foundation



	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

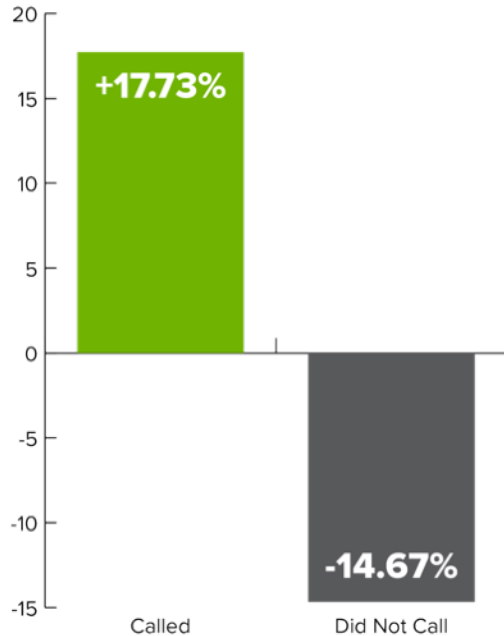
	Never Given	Has Given
Current Parent	Segment 1	Segment 3
Non-Parent	Segment 2	Segment 4

# Guiding principles »

- All donors who give from 11/1 to 12/31 will be thanked within a certain amount of time (this does not include any automated messaging)
- Previous giving (prior to the year-end gift you are acknowledging) will be acknowledged in any thank you messaging
  - Watch out for monthly donors making a “13th” extra YE gift
  - Consider also including how challenging the year was for everyone (including the donor)
- Giving Tuesday gifts will be acknowledged as Giving Tuesday gifts
  - “thank you for giving on Giving Tuesday”
- First-time donors will be thanked \*\*personally\*\*
  - Asked again in under 90 days

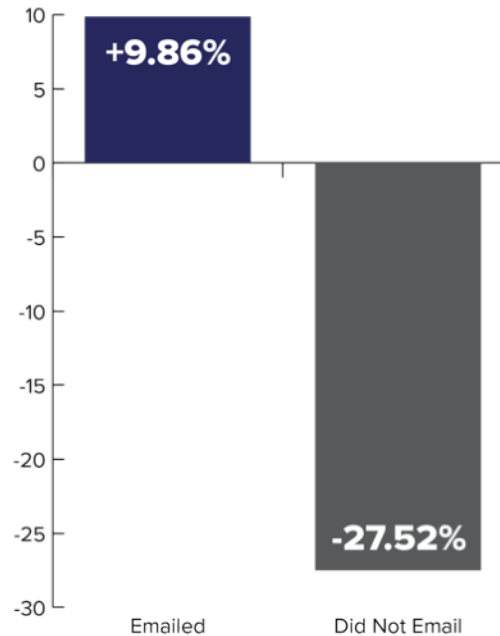
# % change in revenue YoY »

## Phone Calls



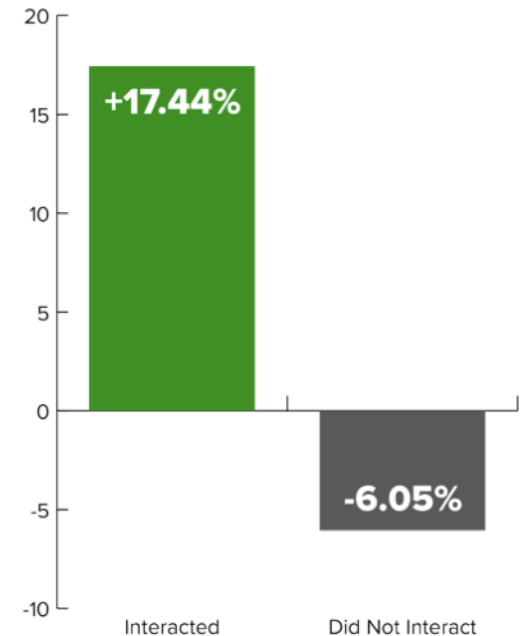
Phone Calls	Customers	%
Called	1,085	26%
Did Not Call	3,015	74%

## Personal Emails




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

## 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! 



**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

outreachindiana.org  
317-951-8886



<https://share.vidyard.com/watch/rh6mDE1mrwLKqZChs2bPfS>

Thank you Steven!



<https://share.vidyard.com/watch/rh6mDE1mrwLKqZChs2bPfS>

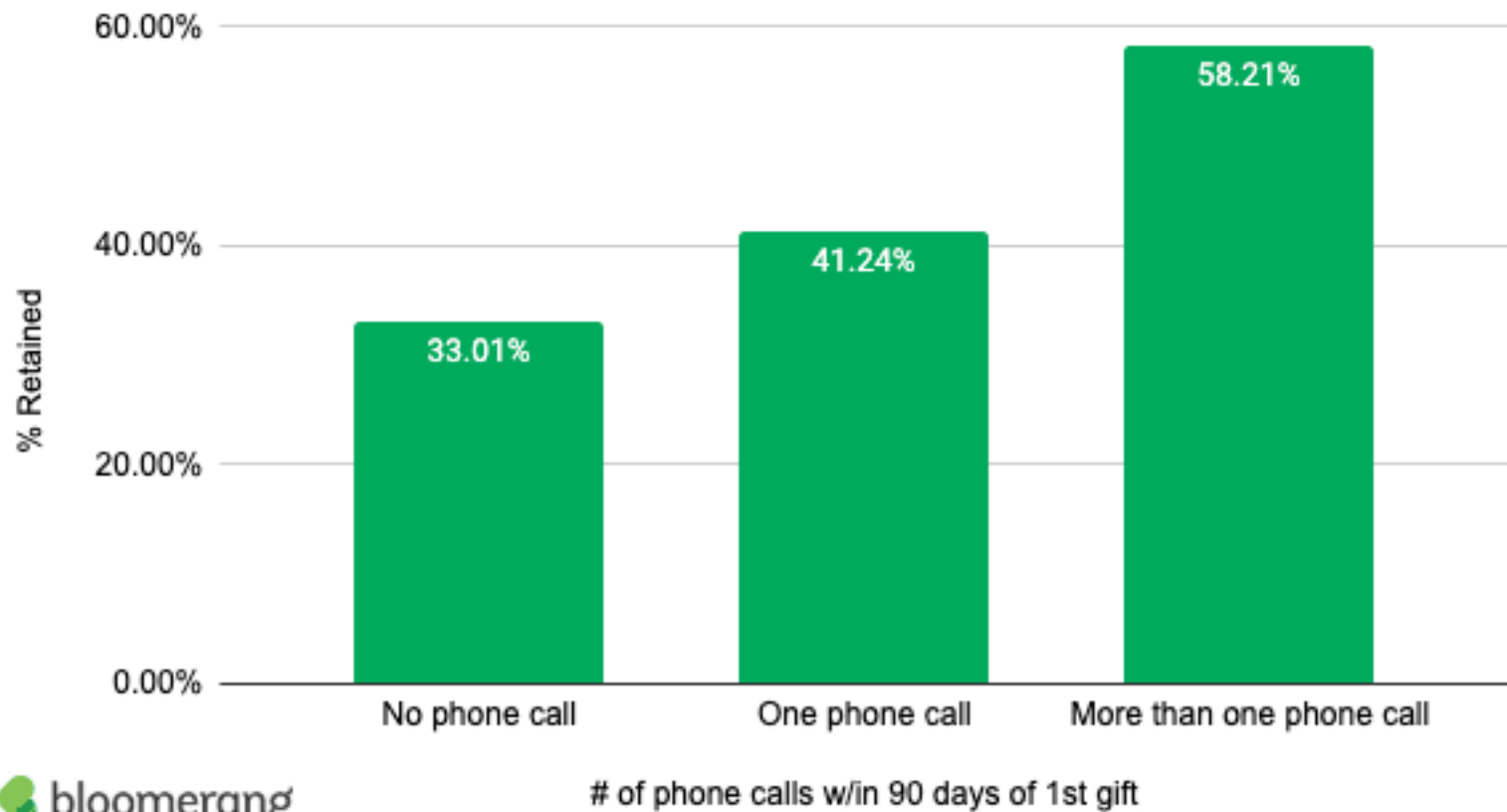
# The fast, personal touch »

- 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)

<http://www.guidestar.org/rxa/news/articles/2010/how-to-increase-donations-by-39-percent.aspx>

# Bloomerang research »

Impact of phone calls on 1st-time donor retention

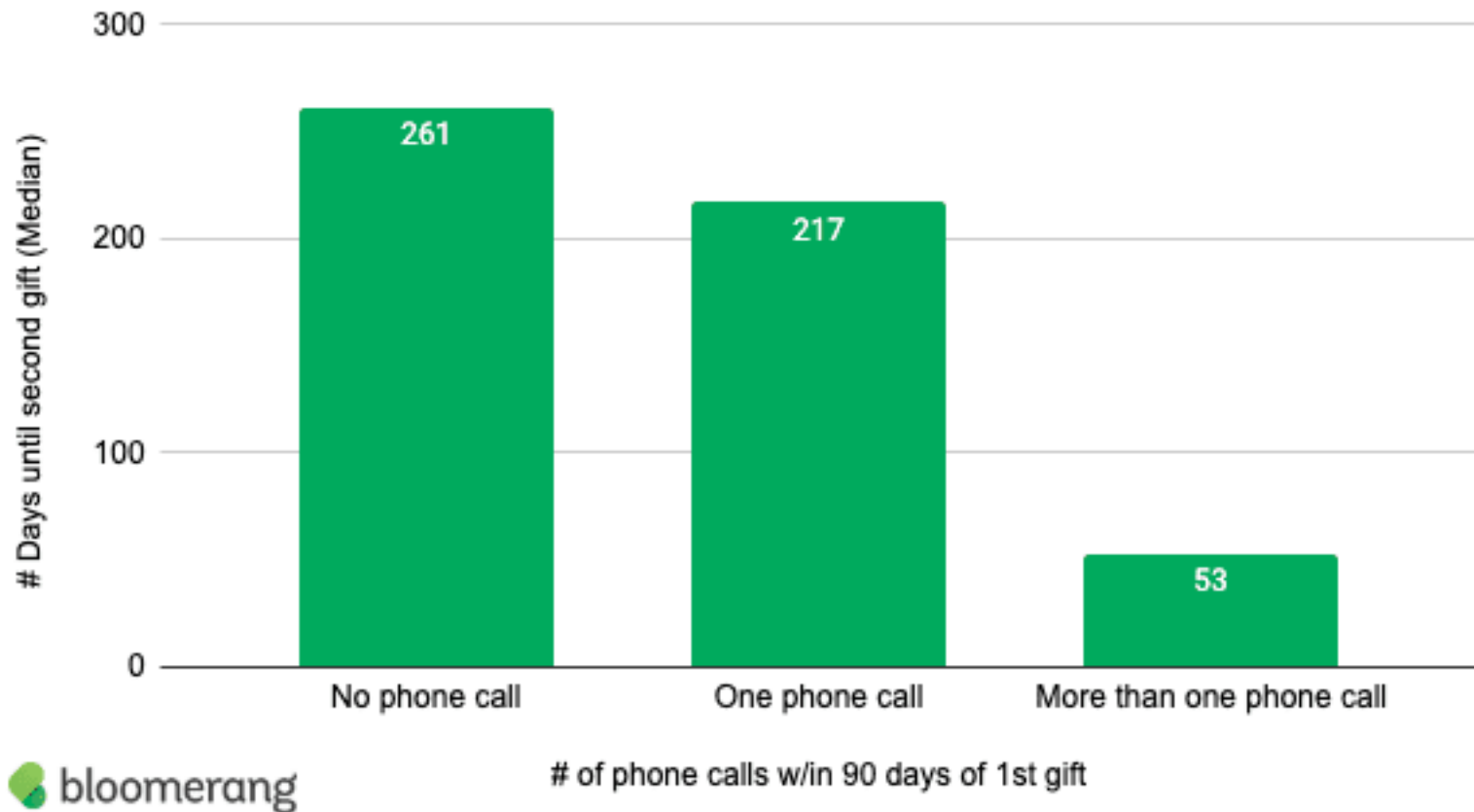


<https://bloomerang.co/blog/actually-calling-donors-to-thank-them-does-make-them-more-likely-to-give-again-and-give-more/>



# Bloomerang research »

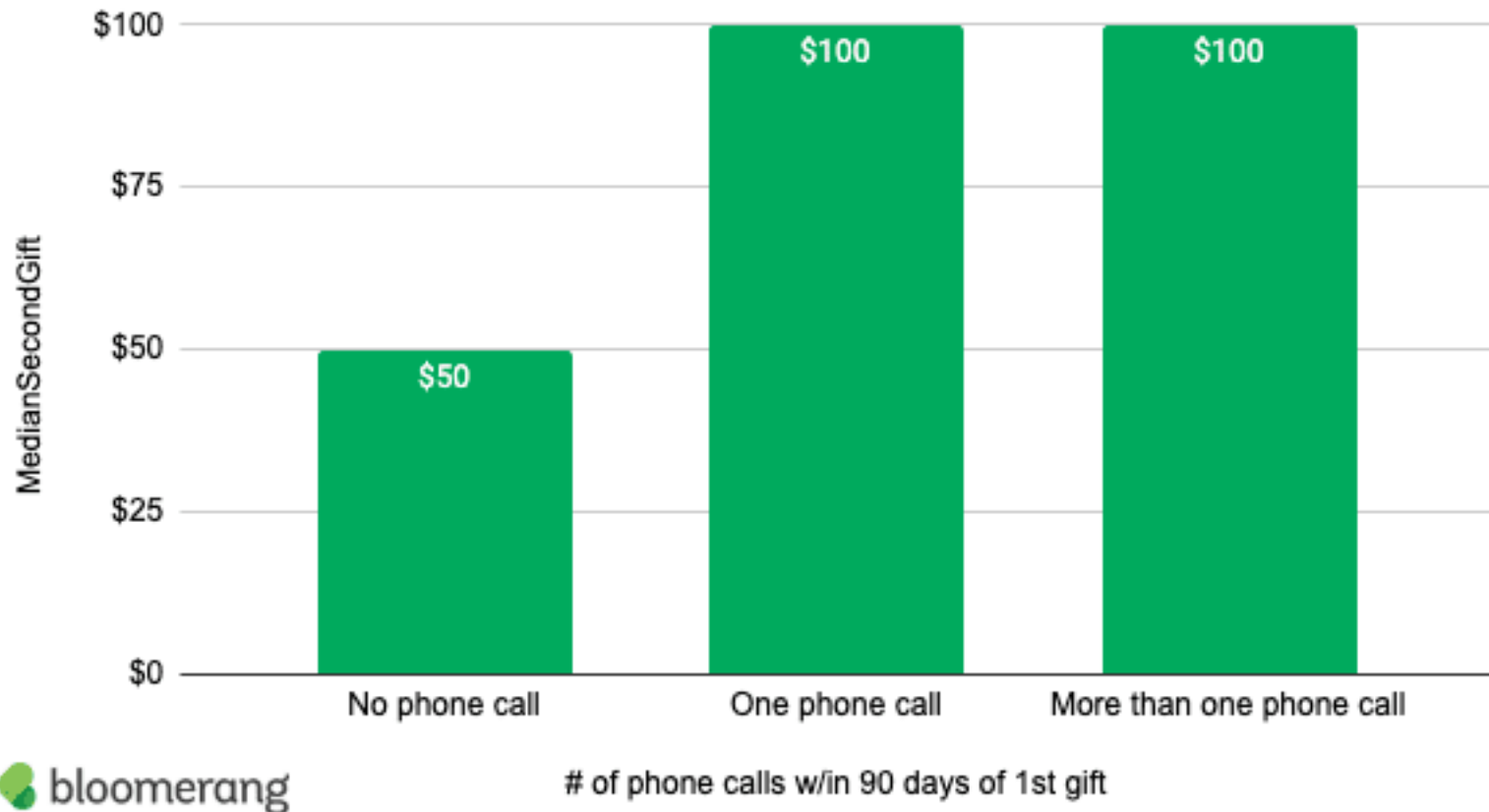
Impact of phone calls on speed of second gift



<https://bloomerang.co/blog/actually-calling-donors-to-thank-them-does-make-them-more-likely-to-give-again-and-give-more/>

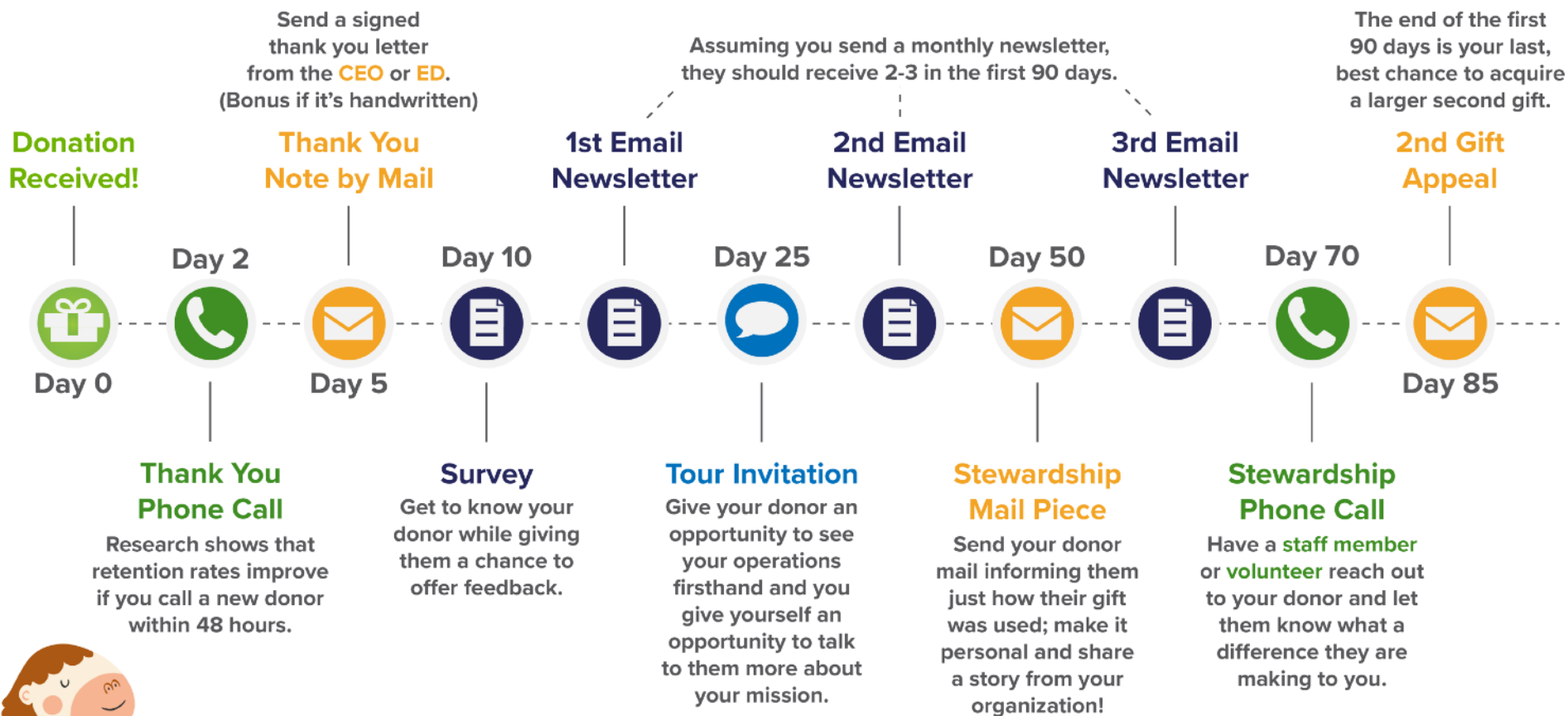
# Bloomerang research »

Impact of phone calls on second gift size



<https://bloomerang.co/blog/actually-calling-donors-to-thank-them-does-make-them-more-likely-to-give-again-and-give-more/>

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



THANK YOU  
for your *first* gift!



*first* DAY



*fir*



*first* MEMORIES



*first* FIELD TRIP

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](mailto:advancement@theoaksacademy.org) | 317.931.3687



# Girls Inc. Girls' Bill of Rights

girls inc.

Inspiring all girls to be strong, smart, and bold

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.

Girls Inc. of Greater Indianapolis  
3935 N. Meridian Street  
Indianapolis, IN 46208  
(317) 283-0086  
girlsincindy.org

## Board of Directors

Ellen Humphrey  
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1<sup>st</sup> Vice Chair

Charlotte Hawthorne  
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Kimberly Davis  
Andrea Farmer  
James Keough  
Joan Lonnemann  
Chad Pittman  
Jim Schacht

Elyssa Campodonico-Barr  
President & CEO



- 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

We are grateful  
for you!

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

## You are inspiring girls to be strong, smart, and bold.

Young Women in Leadership (YWIL) has become more than just an extracurricular to me. It has become a part of my chosen family. Through this program, I have learned how to appropriately plan for my future, become the best leader I can be in my community, and how to manage my time. The program has offered more opportunities than I can list. The program has constant guidance in scholarship application, resume building, finding possible jobs that are available, etc. has instilled a gratitude towards them that I show through my constant involvement with not only this program, but Girls Inc. in general. What makes YWIL so special is that the program directors do all these things to help us, and they do them with creative concepts, open discussion, and a smile.

-Aeriana W.

I seek to challenge myself and find ways to better myself as a person. Girls Inc. is a place to really be yourself and take risks without fear of being looked down upon. This is my first year at Girls Inc. and so far it's great! I love that they encourage you to be yourself and to not just be a follower. For example, recently we had a speaker come in and tell us to be limitless and go beyond what others expect. I've been looking for a program like Girls Inc. that could give me advice and a little guidance in this crazy world, and I'm glad I found it!

-Joleena M.

I enjoyed going to one of the IUPUI campuses and learning how to create and work with graphic designing. I decided to continue working with Girls Inc. because the program shows you different opportunities that are available to you and the program helps you explore careers. You dive deep into yourself wondering what your interests are and what your future looks like. I like how the organization motivates education and who you are personally not just the outside of your skin. Girls Inc. gives many lessons but the main one that I will remember is focusing on my happiness. I can't base all of my decisions on what I think other people will be happy about, sometimes I have to think about myself.

-Cyncere

## Girls HAVE THE RIGHT TO CONFIDENCE IN THEMSELVES AND TO TAKE IN THE WORLD.

Overwhelmingly girls are the targets of perpetrators of violence. Many form girls' lives, including domestic abuse, neglect, bullying, sexual abuse, date crimes. We work to see that girls, developing skills to recognize and situations, mediate conflicts, and face of violence. We oppose the and trivializes girls and women early intervention programs that violence.





# Survey »

- Send a donor info survey to 1st-time donors
- Send a donor satisfaction survey to repeat donors
- Boosts retention even if they don't respond
  - Respondents signify high-engagement
- Email receipt is a great place to include
  - Google Forms / SurveyMonkey / Formstack

<https://bloomerang.co/blog/23-questions-to-ask-donors-and-prospects/>

# 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

<http://www.thedonorvoice.com/national-donor-commitment-study-and-proof-of-link-between-donor-attitudes-and-behavior/>



# We can't do this without you!

Dear ,

Your support for our mission means so much more than we can convey with just, "Thank you". Without you, [fill in outcome] would not be possible.

There's something else you can give that's equally important - your opinion. Your real, honest opinion. Would you mind taking 2 minutes of your time to tell us how we can make you feel more connected to [fill in organization name]? It would mean so much!

Sincerely,  
Executive Director

[Begin Survey](#)

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## Our Contact Information

Blossom's Orangutan Rescue  
5724 Birtz Road  
Indianapolis, IN 46216  
8663322999  
[www.bloomerang.co](http://www.bloomerang.co)

<https://bloomerang.co/blog/category/donor-surveys/>

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

# Peer-to-peer gifts »

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

<https://go.qgiv.com/ebook-retaining-your-p2peeps>

# Final thoughts »

- Make retention a priority in the new year.
- Segment your donors.
- Create a written comms plan for each segment.
  - Concentrate on first-time donors.
    - Get that second gift!
- Personalize!
- Personal, 1:1 outreach works.
- Steward, then solicit.

# FREE ABSOLUTELY RESOURCES

All of our fundraising knowledge at your fingertips!

- Daily blog post
- Weekly webinars
- eBooks/guides
- Templates
- Bloomerang TV
- Research

<https://bloomerang.co/resources>



Donor management software  
**nonprofits actually love to use.**

**WATCH A VIDEO DEMO**

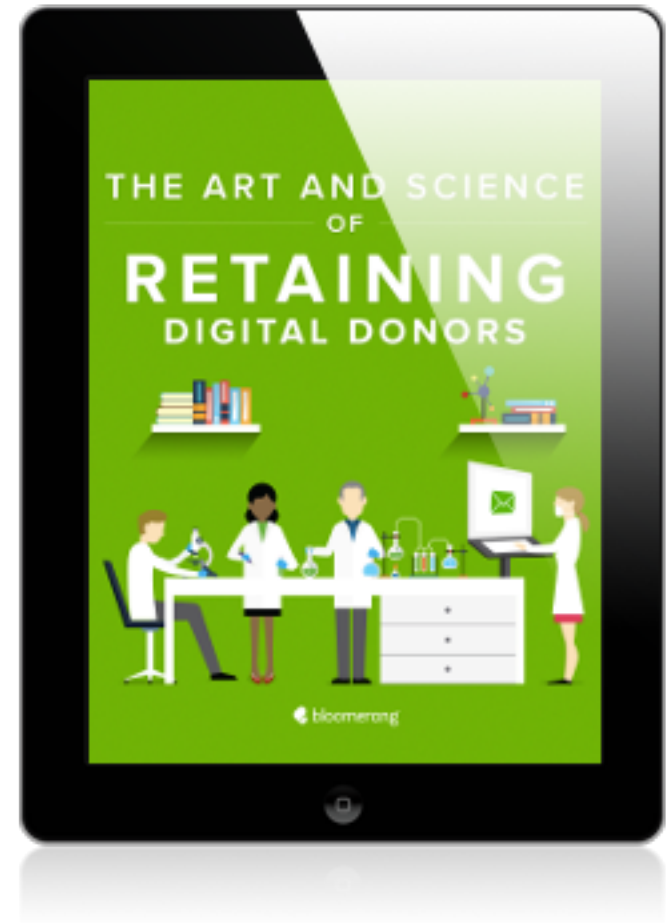
<https://bloomerang.co/demo/video>

# Questions?

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@StevenShattuck

## Free eBook »



<https://bloomerang.co/resources/guides/>



# Questions?

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This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.





# Thank you for joining!

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For more information on Qgiv's fundraising platform, contact:

[contactus@qgiv.com](mailto:contactus@qgiv.com) | 888-855-9595

For more information on Bloomerang, contact:

[steven.shattuck@bloomerang.co](mailto:steven.shattuck@bloomerang.co)