# TURNING DATA INTO STRATEGY

**Boosting Donor Retention with the Fundraising Fitness Test** 



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WHAT IS THE FUNDRAISING FITNESS TEST?



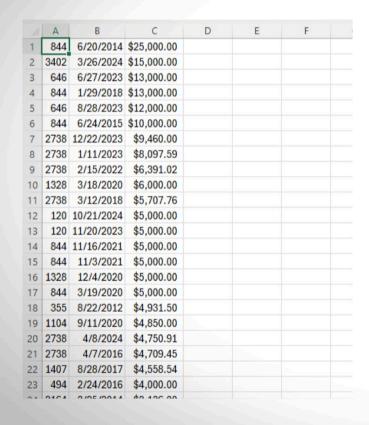
Customizable report from the Fundraising Effectiveness Project

Measures donor retention, acquisition, and a slew of fundraising metrics

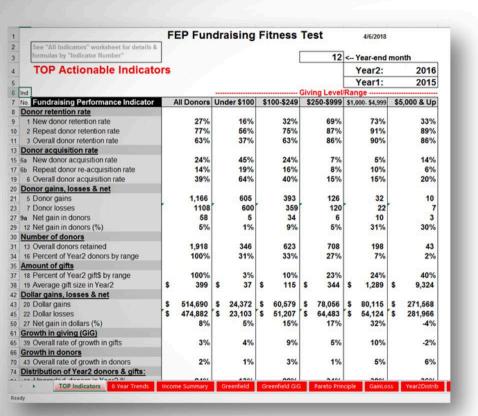
Provides FREE benchmarking for your fundraising program

# AFPGLOBAL.ORG/FUNDRAISINGEFFECTIVENESSPROJECT AFPGLOBAL.ORG/FEPTOOLS

# **HOW IT WORKS**



- Download the template
- Export your data
   Donor ID, Date of Gift, Gift Amount (non-zero)
   Seven years to fully populate the report
- Paste it into the template
- Walk away from your computer for a bit depending on the quantity of your data



FEP Fundraising Fitness Test											4/6/2018					
61- V T I A							_	12	<							
Six Year Trend Analysis	-								_	Year2:	2016					
									_	Year1:	2015					
												6-Year				
Fundraising Performance Indicator		2011		2012		2013		2014		2015	2016	ROG				
											YTD					
36 Total gifts in Year1	s	667,917	s	818,368	s	738,495	s	967,703	s	981,302	\$ 1,189,944					
37 Total gifts in Year2	s	818,368	s	738,495	S	967,703	s	981,302	s	1,189,944	\$ 1,229,752	84%				
or roungines in roung		,	100	, , , , ,	7	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	85%		1		- ,,_2,,,,,					
40 Total donors in Year1	1	2,267		2,505		2,768		2,541		3,023	3,026					
41 Total donors in Year2		2,505		2,768		2,541		3,023		3,026	3,084	36%				
78c Number of gifts in Year2		10,314		10,962		11,207		12,425		12,791	13,207	3,000				
78d Average frequency in Year2		4.12		3.96		4.41		4.11		4.23	4.28					
78e Average amount in Year2	\$	79.35	\$	67.37	\$	86.35	\$	78.98	\$	93.03	\$ 93.11					
	1	Service and				F. W. (Ball)					218550					
72 Monthly donors in Year2 ****		608	1920	628	Q.,	657	9235	683		700	716					
75 Monthly-donor gifts in Year2	\$	355,365	\$	353,440	\$	391,405	\$	431,082	\$	453,532	\$ 473,325					
new Net change in monthly donors*	١			103%		105%		104%		102%	102%					
	1															
5a New donors in Year2	ı .	904		1,010		658		967		823	734					
5b Reactivated donors in Year2		254		275		311		407		358	432					
2a Repeat donors in Year2		1,347		1,483		1,572		1,649		1,845	1,918					
58a Upgraded in Year2		642		583		688		600		737	738					
60a Same in Year2		293		299		385		456		534	579					
62a Downgraded in Year2		412		601		499		593		574	601					
7 Lapsed donors		920		1,022		1,196		892		1,178	1,108					
7a New in Year1		605		618		725		437		674	597					
7b Repeat in Year1		315		404		471		455		504	511					

TOP indicators 6 Year Trends Income Summary Greenfield Greenfield GIG Pareto Principle GainLoss Year 2Distrib Comparison - FEP Ratio



# **KEY METRICS**

- Retention rate
- Segment retention
- Gift frequency

# **AN EXAMPLE**

## **CLOSE TO REAL TIME ANALYSIS**

- Question: What can we do to improve?
- Conditions

Declining audiences and donors nationwide

On-air fundraising has crashed across the country

Major markets are announcing staff layoffs on a weekly basis

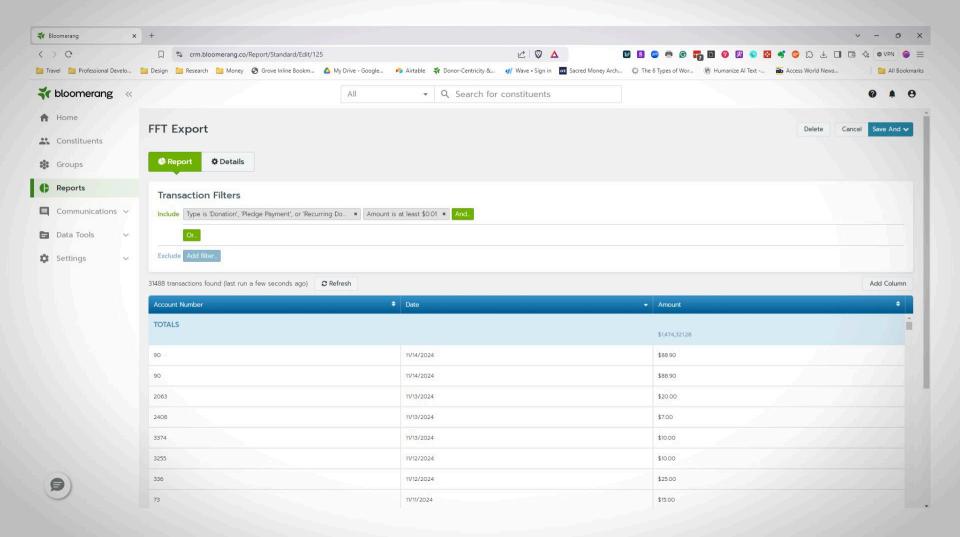


# AREAS FOR IMPROVEMENT





Review top indicators and six year trends



# **BENCHMARKING**



	2023 FEP Benchmark	October 2024 stats
Overall Donor Retention	42%	65%
Repeat Donor Retention	58%	71%
Acquisition Rate	39%	34%
Gift Frequency		7.38

#### **FEP Fundraising Fitness Test**

#### Six Year Trend Analysis

10	< Year-end month								
	Year2:	2024							
	Vear1	2023							

Fundraising Performance Indicator	2019	2020		2021	2022		2023	2024	
36 Total gifts in Year1	\$ 96,070	\$ 93,945	\$	99,715	\$ 83,538	\$	85,237	\$ 98,778	
37 Total gifts in Year2	\$ 93,945	\$ 99,715	\$	83,538	\$ 85,237	\$	98,778	\$ 107,113	
40 Total donors in Year1	404	451		397	333		268	231	
41 Total donors in Year2	451	397		333	268		231	229	
78c Number of gifts in Year2	2,432	2,395		2,263	2,009		1,749	1,689	
78d Average frequency in Year2	5.39	6.03		6.80	 7.50		7.57	7.38	
78e Average amount in Year2	\$ 38.63	\$ 41.63	\$	36.91	\$ 42.43	\$	56.48	\$ 63.42	
72 Monthly donors in Year2 ****	167	168	B. 1.27	164	145	1.571.09	127	115	
75 Monthly-donor gifts in Year2	\$ 44,890	\$ 46,494	\$	47,347	\$ 40,394	\$	63,731	\$ 41,446	
new Net change in monthly donors*		101%		98%	88%		88%	91%	





# **TACTICS**



- Focus on developing new acquisition tactics
- Increased messaging about monthly donors
- Shift stewardship efforts to monthly donors because they are upgrading

## **IDENTIFYING TRENDS AND OPPORTUNITIES**

- Are first-time donors converting?
- What segments are most loyal?
- Are donors upgrading?
- How often are people donating?
- Where are the biggest drop-offs?

# **COMMON GAPS AND FIXES**

High first-time donor attrition

FIRST-TIME DONOR STEWARDSHIP TACTICS

Lapsing donors in a specific segment

DONOR REACTIVATION STRATEGIES

(Dr. April Willis's webinar)

Stagnant revenue from mid-level donors

UPGRADE STRATEGIES
AND TARGETED
STEWARDSHIP



- Quarterly FFT assessment
- Use data to look at the highest and lowestperforming segments
- Develop specific retention-focused tactics

# **TAKEAWAYS**

- The Fundraising Fitness Test provides databacked donor insights
- Interpreting trends can help focus fundraising strategies
- Actionable steps lead to higher retention and stronger fundraising results



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