

TURNING DATA INTO STRATEGY

Boosting Donor Retention with the Fundraising Fitness Test



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Donor retention is the cornerstone for sustainable fundraising success

OVERALL DONOR RETENTION
40-45%

REPEAT DONOR RETENTION
60%+



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](https://afpglobal.org/fundraisingeffectivenessproject)

[AFPGLOBAL.ORG/FEPTOOLS](https://afpglobal.org/feptools)

HOW IT WORKS

	A	B	C	D	E	F
1	844	6/20/2014	\$25,000.00			
2	3402	3/26/2024	\$15,000.00			
3	646	6/27/2023	\$13,000.00			
4	844	1/29/2018	\$13,000.00			
5	646	8/28/2023	\$12,000.00			
6	844	6/24/2015	\$10,000.00			
7	2738	12/22/2023	\$9,460.00			
8	2738	1/11/2023	\$8,097.59			
9	2738	2/15/2022	\$6,391.02			
10	1328	3/18/2020	\$6,000.00			
11	2738	3/12/2018	\$5,707.76			
12	120	10/21/2024	\$5,000.00			
13	120	11/20/2023	\$5,000.00			
14	844	11/16/2021	\$5,000.00			
15	844	11/3/2021	\$5,000.00			
16	1328	12/4/2020	\$5,000.00			
17	844	3/19/2020	\$5,000.00			
18	355	8/22/2012	\$4,931.50			
19	1104	9/11/2020	\$4,850.00			
20	2738	4/8/2024	\$4,750.91			
21	2738	4/7/2016	\$4,709.45			
22	1407	8/28/2017	\$4,558.54			
23	494	2/24/2016	\$4,000.00			

- **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

See "All Indicators" worksheet for details & formulas by "Indicator Number"

12 <-- Year-end month

Year2: 2016

Year1: 2015

TOP Actionable Indicators

Giving Level/Range

No.	Fundraising Performance Indicator	All Donors	Under \$100	\$100-\$249	\$250-\$999	\$1,000-\$4,999	\$5,000 & Up
Donor retention rate							
1	New donor retention rate	27%	16%	32%	69%	73%	33%
2	Repeat donor retention rate	77%	56%	75%	87%	91%	89%
3	Overall donor retention rate	63%	37%	63%	86%	90%	86%
Donor acquisition rate							
5a	New donor acquisition rate	24%	45%	24%	7%	5%	14%
6b	Repeat donor re-acquisition rate	14%	19%	16%	8%	10%	6%
6	Overall donor acquisition rate	39%	64%	40%	15%	15%	20%
Donor gains, losses & net							
5	Donor gains	1,166	605	393	126	32	10
7	Donor losses	1108	600	359	120	22	7
9a	Net gain in donors	58	5	34	6	10	3
12	Net gain in donors (%)	5%	1%	9%	5%	31%	30%
Number of donors							
13	Overall donors retained	1,918	346	623	708	198	43
16	Percent of Year2 donors by range	100%	31%	33%	27%	7%	2%
Amount of gifts							
18	Percent of Year2 gift\$ by range	100%	3%	10%	23%	24%	40%
19	Average gift size in Year2	\$ 399	\$ 37	\$ 115	\$ 344	\$ 1,289	\$ 9,324
Dollar gains, losses & net							
20	Dollar gains	\$ 514,690	\$ 24,372	\$ 60,579	\$ 78,056	\$ 80,115	\$ 271,568
22	Dollar losses	\$ 474,882	\$ 23,103	\$ 51,207	\$ 64,483	\$ 54,124	\$ 281,966
27	Net gain in dollars (%)	8%	5%	15%	17%	32%	-4%
Growth in giving (GIG)							
39	Overall rate of growth in gifts	3%	4%	9%	5%	10%	-2%
Growth in donors							
43	Overall rate of growth in donors	2%	1%	3%	1%	5%	6%
Distribution of Year2 donors & gifts:							

TOP Indicators 6 Year Trends Income Summary Greenfield Greenfield GIG Pareto Principle GainLoss Year2Distrib

FEP Fundraising Fitness Test

4/6/2018

12 <-- Year-end month

Year2: 2016

Year1: 2015

Six Year Trend Analysis

Fundraising Performance Indicator	2011	2012	2013	2014	2015	2016	6-Year YTD
36 Total gifts in Year1	\$ 667,917	\$ 818,368	\$ 738,495	\$ 967,703	\$ 981,302	\$ 1,189,944	
37 Total gifts in Year2	\$ 818,368	\$ 738,495	\$ 967,703	\$ 981,302	\$ 1,189,944	\$ 1,229,752	84%
40 Total donors in Year1	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	
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	
72 Monthly donors in Year2 ****	608	628	657	683	700	716	
75 Monthly-donor gifts in Year2	\$ 355,365	\$ 353,440	\$ 391,405	\$ 431,082	\$ 453,632	\$ 473,325	
new Net change in monthly donors*		103%	105%	104%	102%	102%	
5a New donors in Year2	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	466	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 Year2Distrib Comparison - FEP Ratio



DON'T USE IT ALL

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

- Run the FFT on any 12-month period by changing the end date
- Review top indicators and six year trends



FFT Export

Delete Cancel Save And

Report Details

Transaction Filters

Include Type is 'Donation', 'Pledge Payment', or 'Recurring Do... Amount is at least \$0.01 And

Or

Exclude Add filter

31488 transactions found (last run a few seconds ago)

Refresh

Add Column

Account Number	Date	Amount
TOTALS		\$1,474,321.28
90	11/14/2024	\$88.90
90	11/14/2024	\$88.90
2063	11/13/2024	\$20.00
2408	11/13/2024	\$7.00
3374	11/13/2024	\$10.00
3255	11/12/2024	\$10.00
336	11/12/2024	\$25.00
73	11/11/2024	\$15.00

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

11/20/2024

FEP Fundraising Fitness Test

Six Year Trend Analysis

10 <-- Year-end month

Year2: 2024

Year1: 2023

Fundraising Performance Indicator		2019	2020	2021	2022	2023	2024
							YTD
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	164	145	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 lowest-performing segments**
- ✓ **Develop specific retention-focused tactics**

TAKEAWAYS

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



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