Using Data to Guide Your Annual Giving Strategy

BENTZ
WHALEY
FLESSNER

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Sources of Data

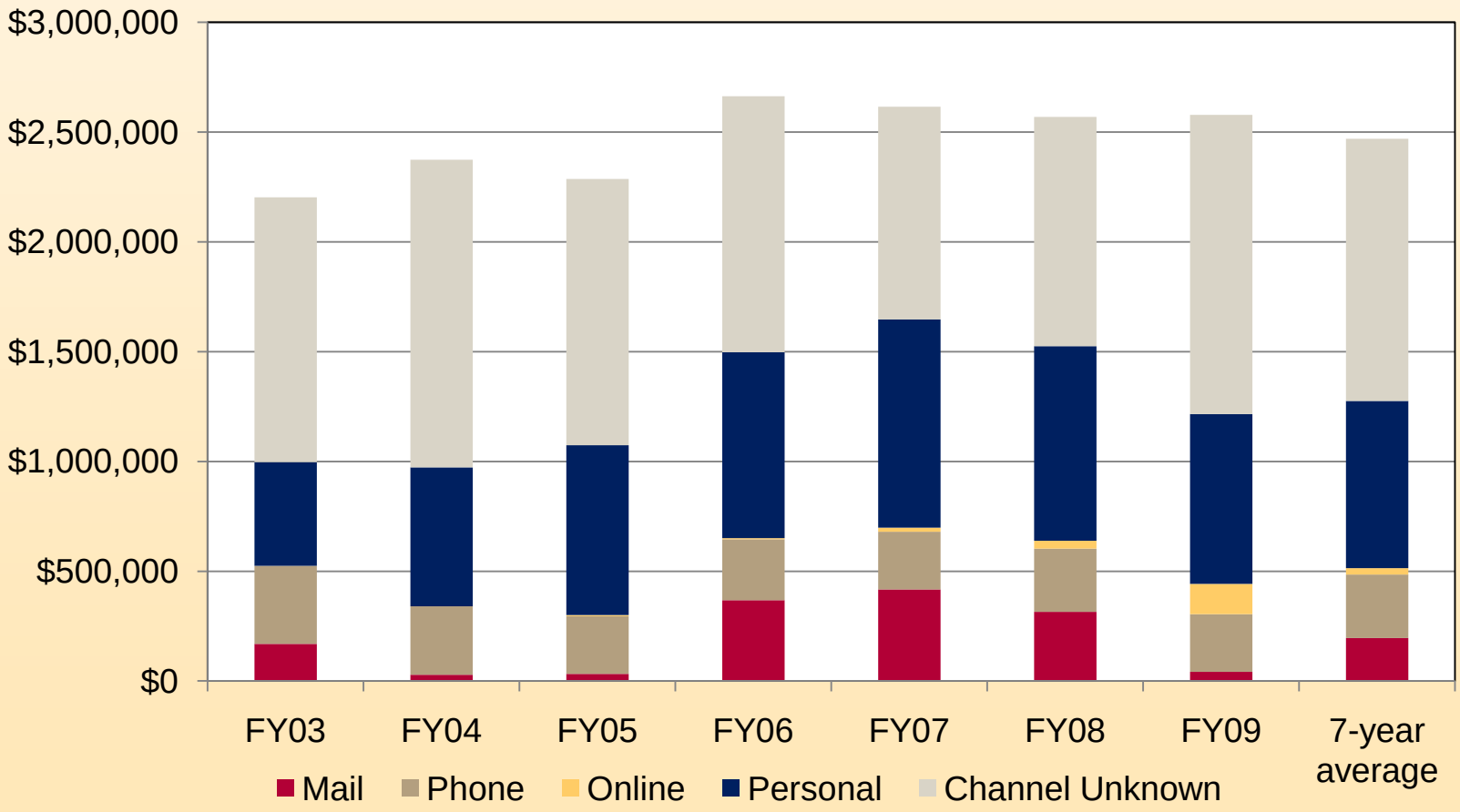
- Data about your programs
- Data about your constituents
- Data about your peers

Data is only helpful IF:

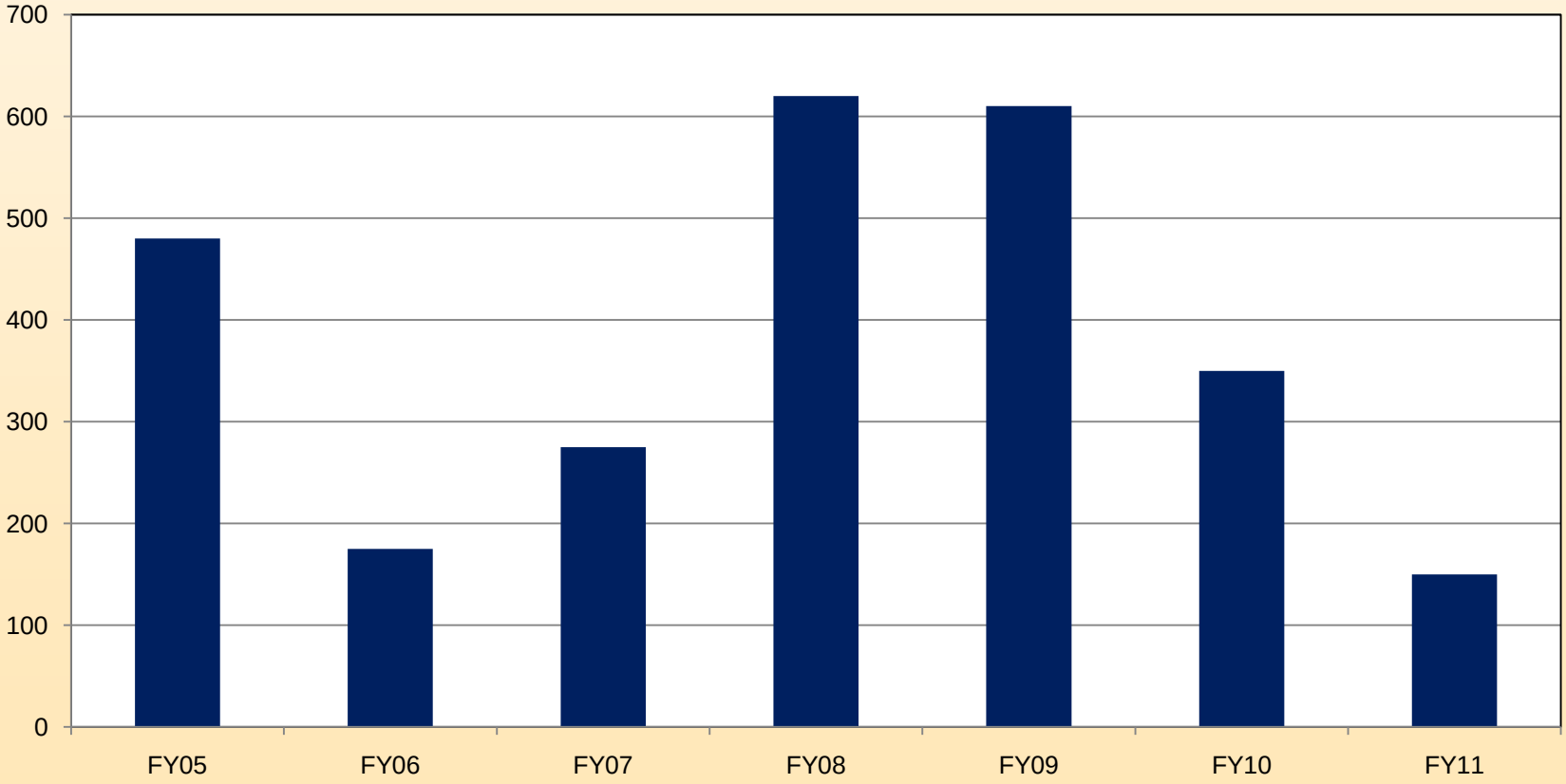
- **It is actionable.**
- **It is understandable.**
- **Time is devoted to analysis, interpretation, and application.**

Data About Your Programs

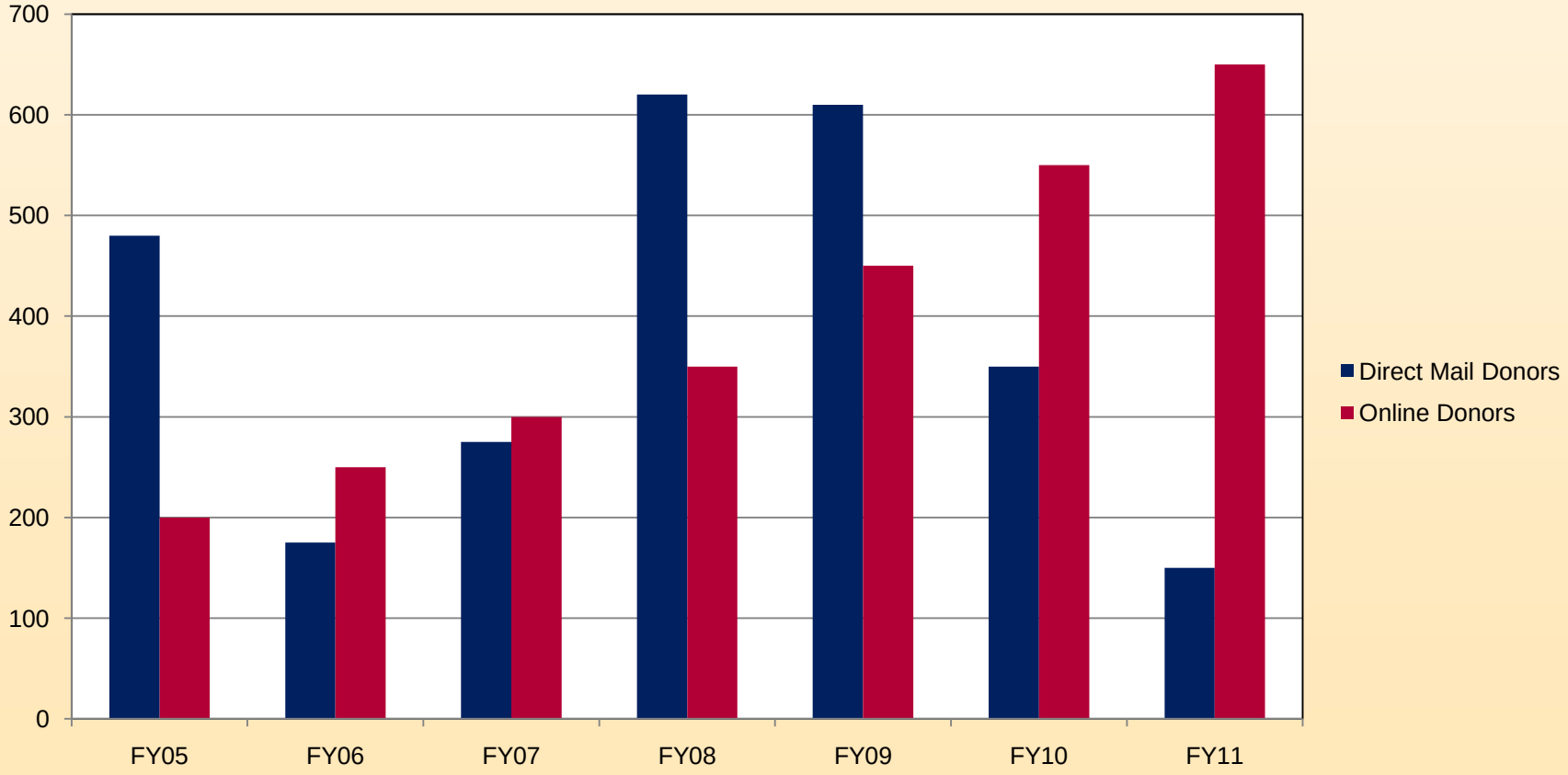
FY03–FY09 Annual Giving Dollars by Solicitation Channel



FY05–FY11 Direct Mail Annual Giving Donors



FY05–FY11 Direct Mail and Online Annual Giving Donors

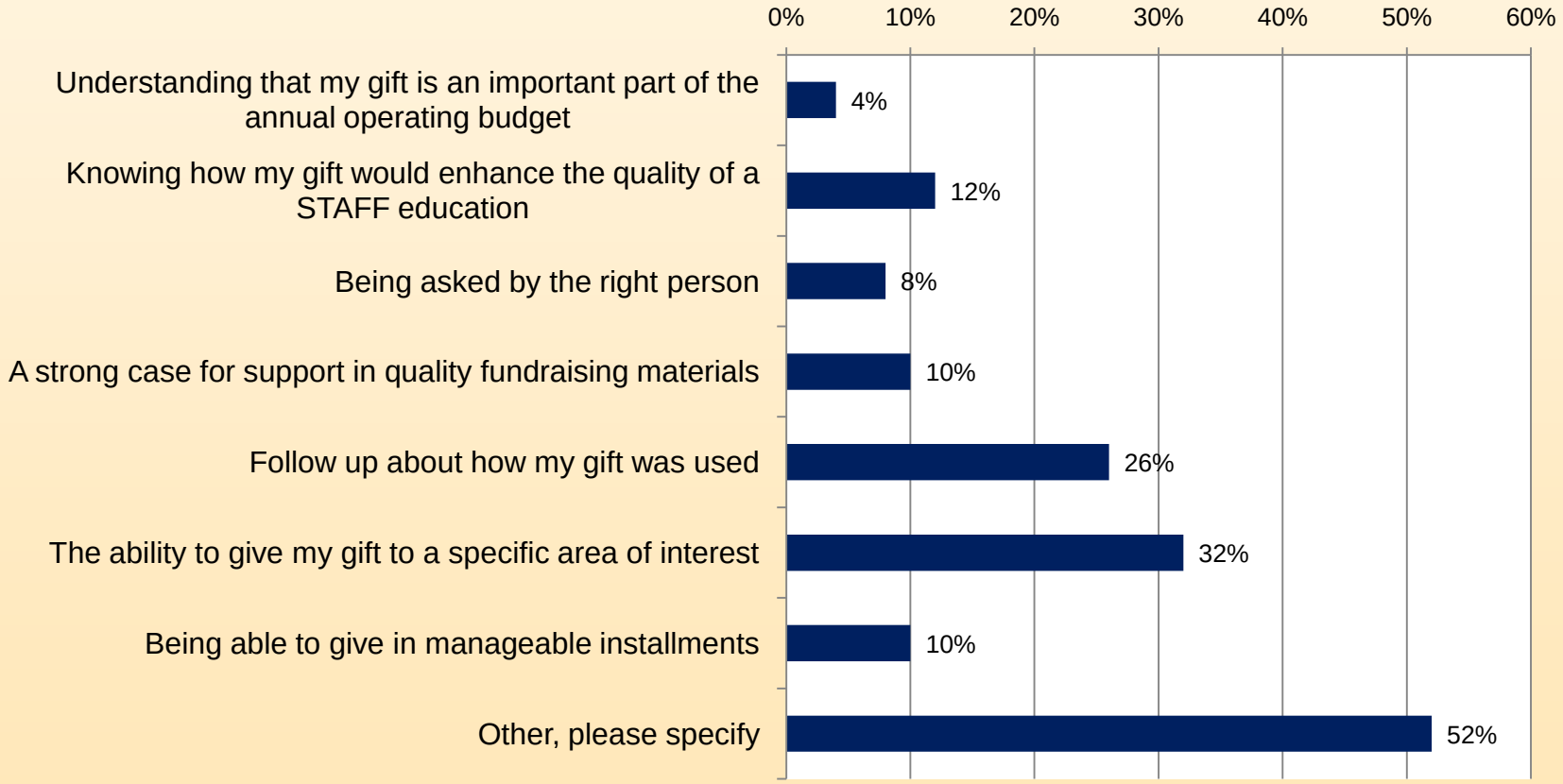


FY05–FY11 Annual Giving Dollars by Alumni Graduation Decade

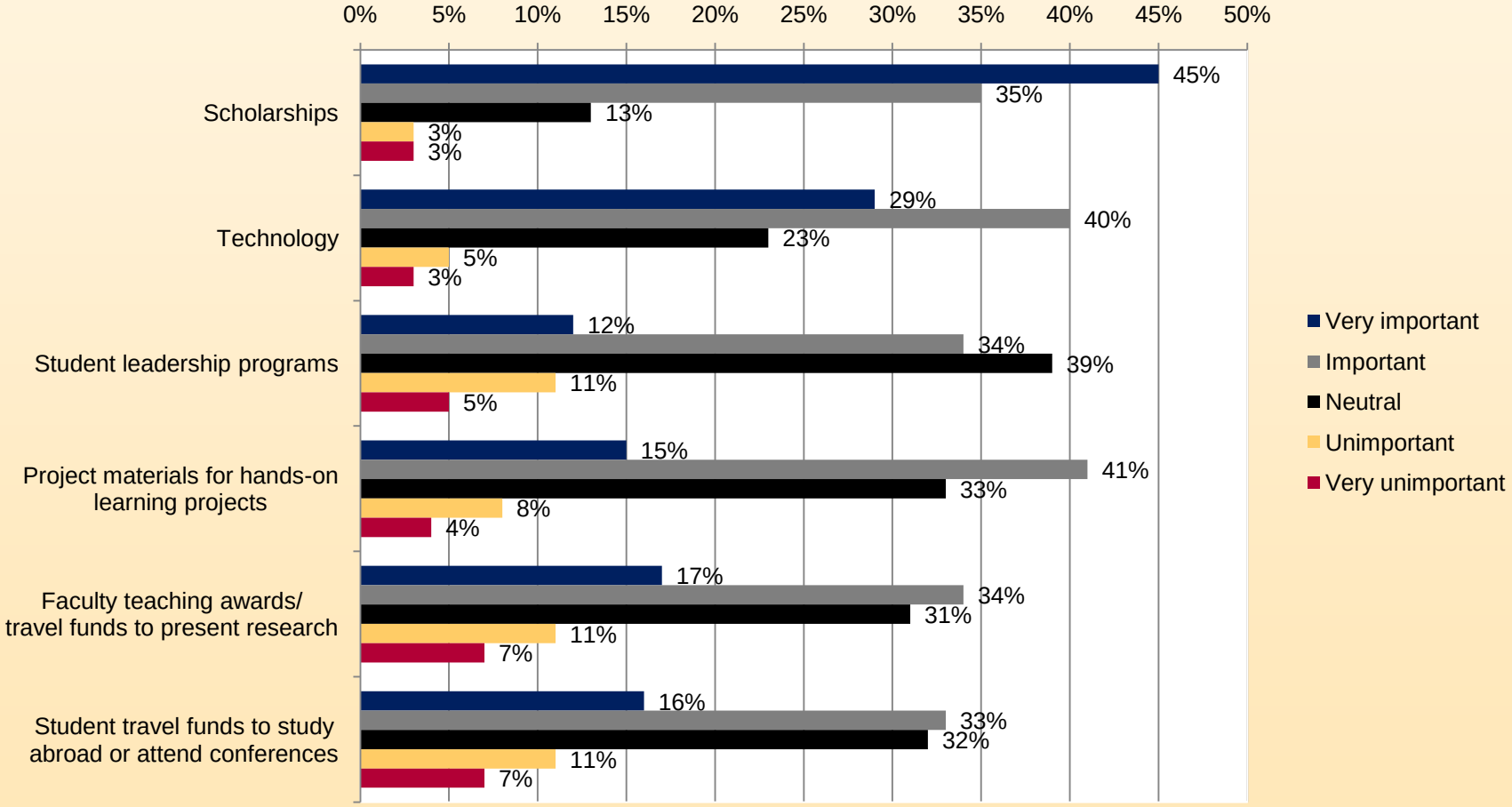
	FY05	FY06	FY07	FY08	FY09	FY10	FY11	*7-year average*
Pre 1950s	**$80,793**	$78,405	$45,275	$33,903	$40,987	$38,939	$23,524	*$48,832*
1950s	**$73,799**	$58,297	$58,954	$71,341	$55,296	$64,702	$54,831	*$62,460*
1960s	$158,952	$197,738	$147,154	$153,081	**$171,660**	$170,464	$155,884	*$164,991*
1970s	$235,646	**$252,406**	$194,707	$225,819	$223,259	$203,799	$208,798	*$220,634*
1980s	$175,444	$186,847	$162,273	$164,067	**$195,540**	$188,674	$163,297	*$176,592*
1990s	$69,814	$56,927	$51,762	$59,031	$65,759	**$79,989**	$72,740	*$65,146*
2000s	$46,714	$71,887	$88,231	**$116,037**	$99,522	$81,598	$67,359	*$81,621*

Data About Your Constituents

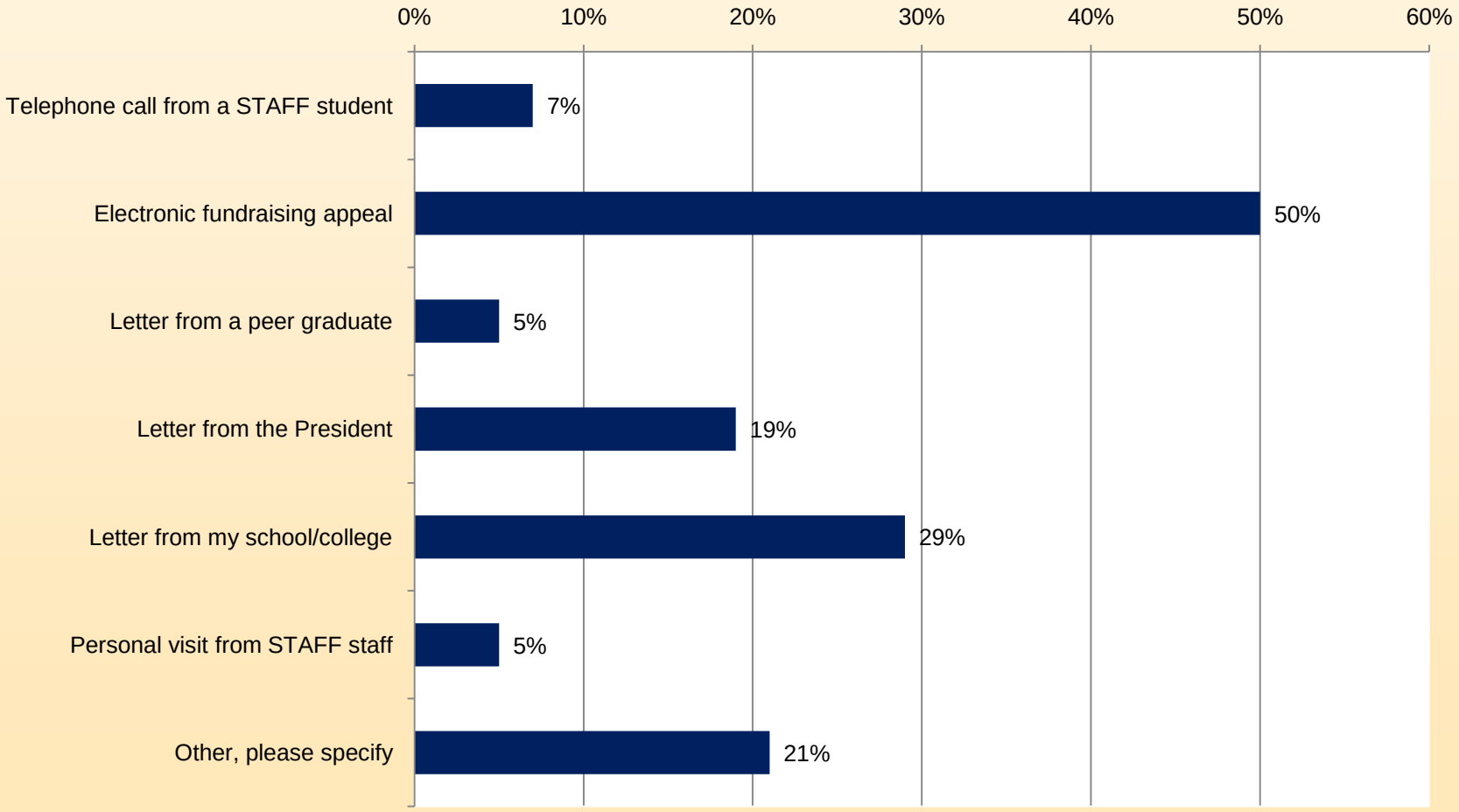
What would motivate you to make a gift to STAFF?



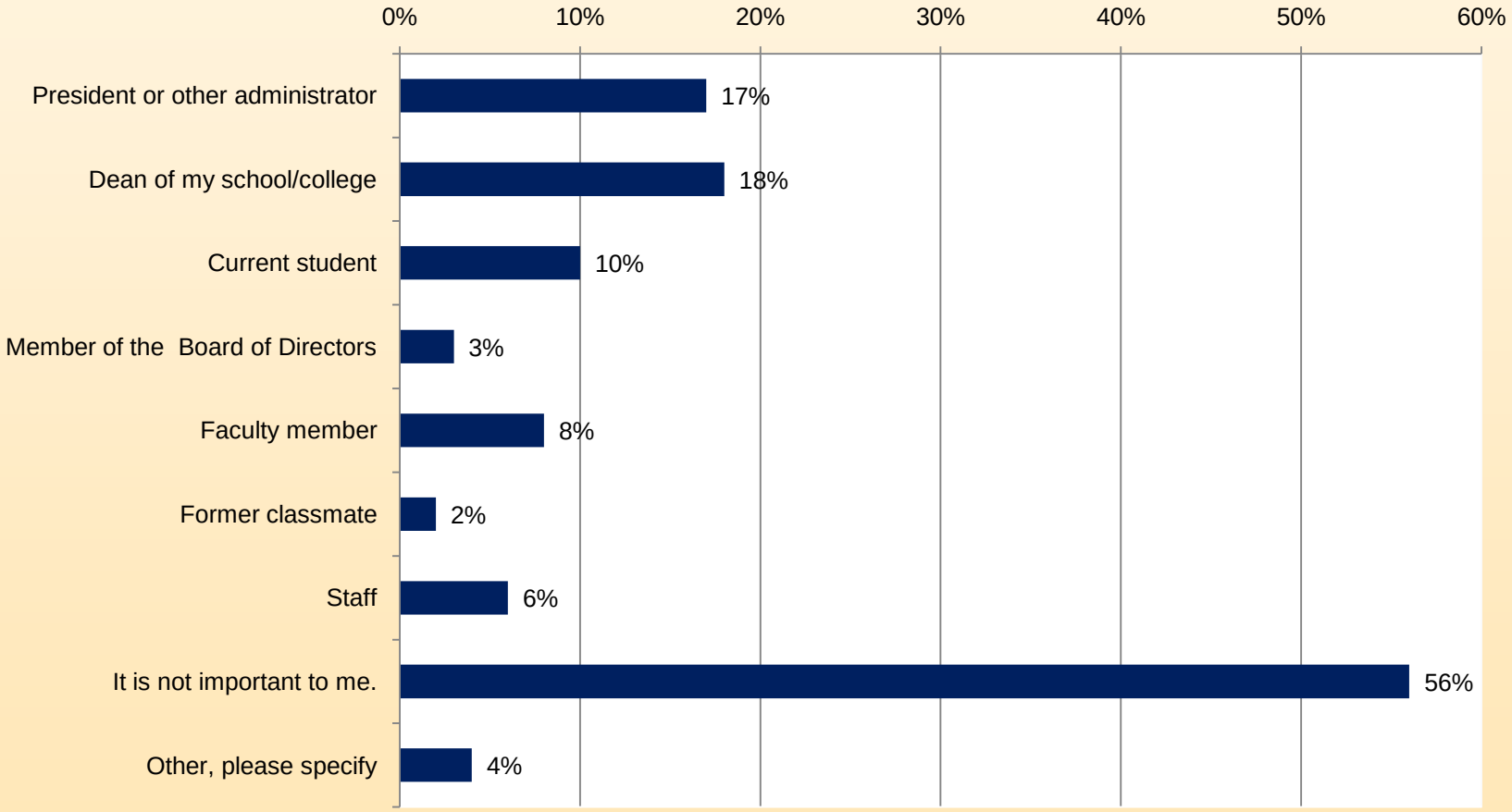
Rate the areas supported by the STAFF Fund by their importance to you:



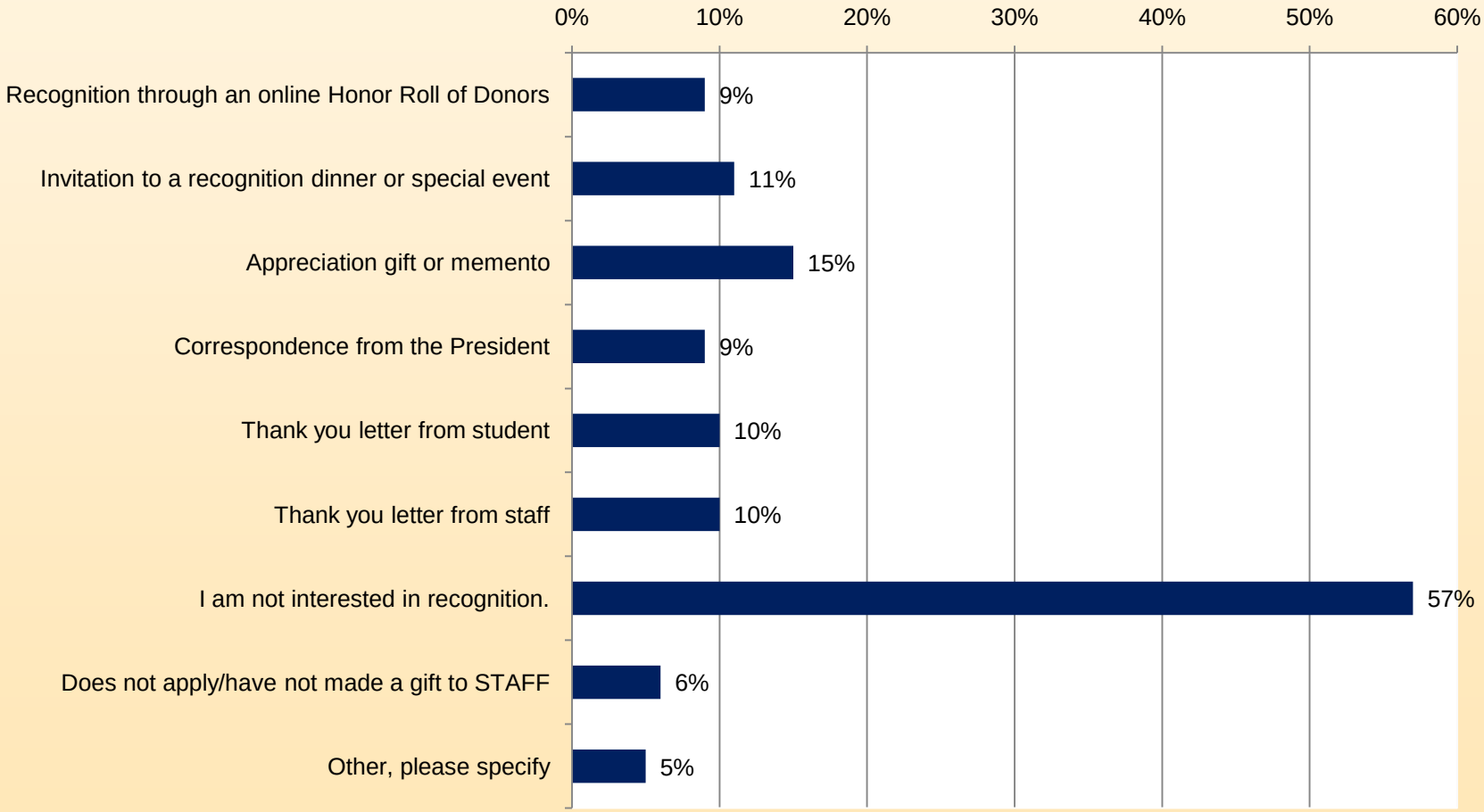
Which of these fundraising communications would you like to receive?



If the source of the solicitation is important to you, from whom would you most like to hear?



How would you like STAFF to recognize your gifts?



Data About Your Peers

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- **Three cheers for STAFF!**
- **Demonstrates the value in investing in annual giving.**
- **Beware of S.O.S.**

STAFF University

- 24,500 alumni, of whom 21,400 are solicitable.
- Annual giving has 6 professional and 2 support staff, managing 450 volunteers.
- Annual giving raises $6.5M, out of development's $25M.

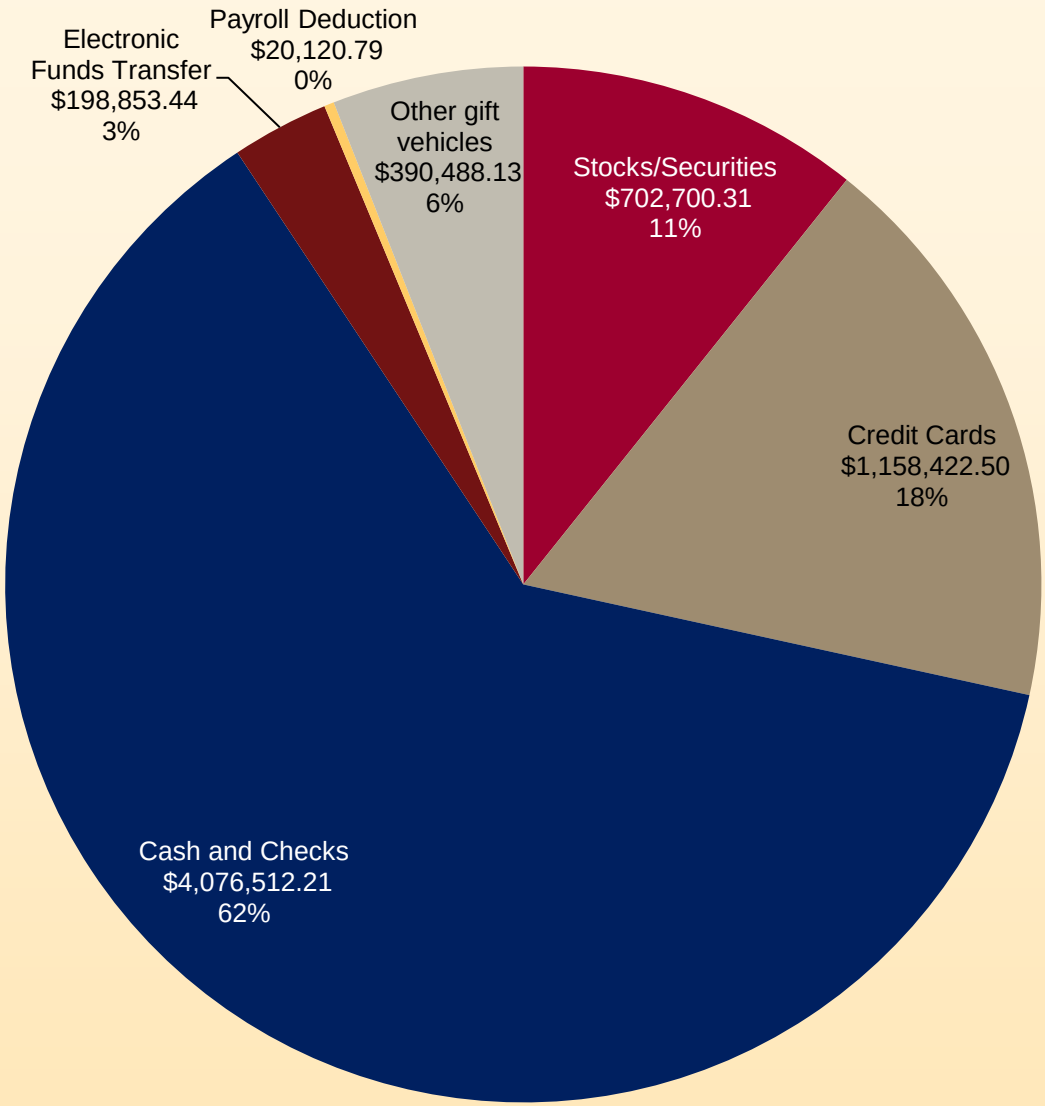
Sources of Revenue

Phonathon Pledges	$355,268
Phonathon Gifts	$129,307
Online Gifts	$736,644
Current Reunion Gifts	$1,275,233
Future Reunion Pledges	$769,993
Matching Gift	$258,448

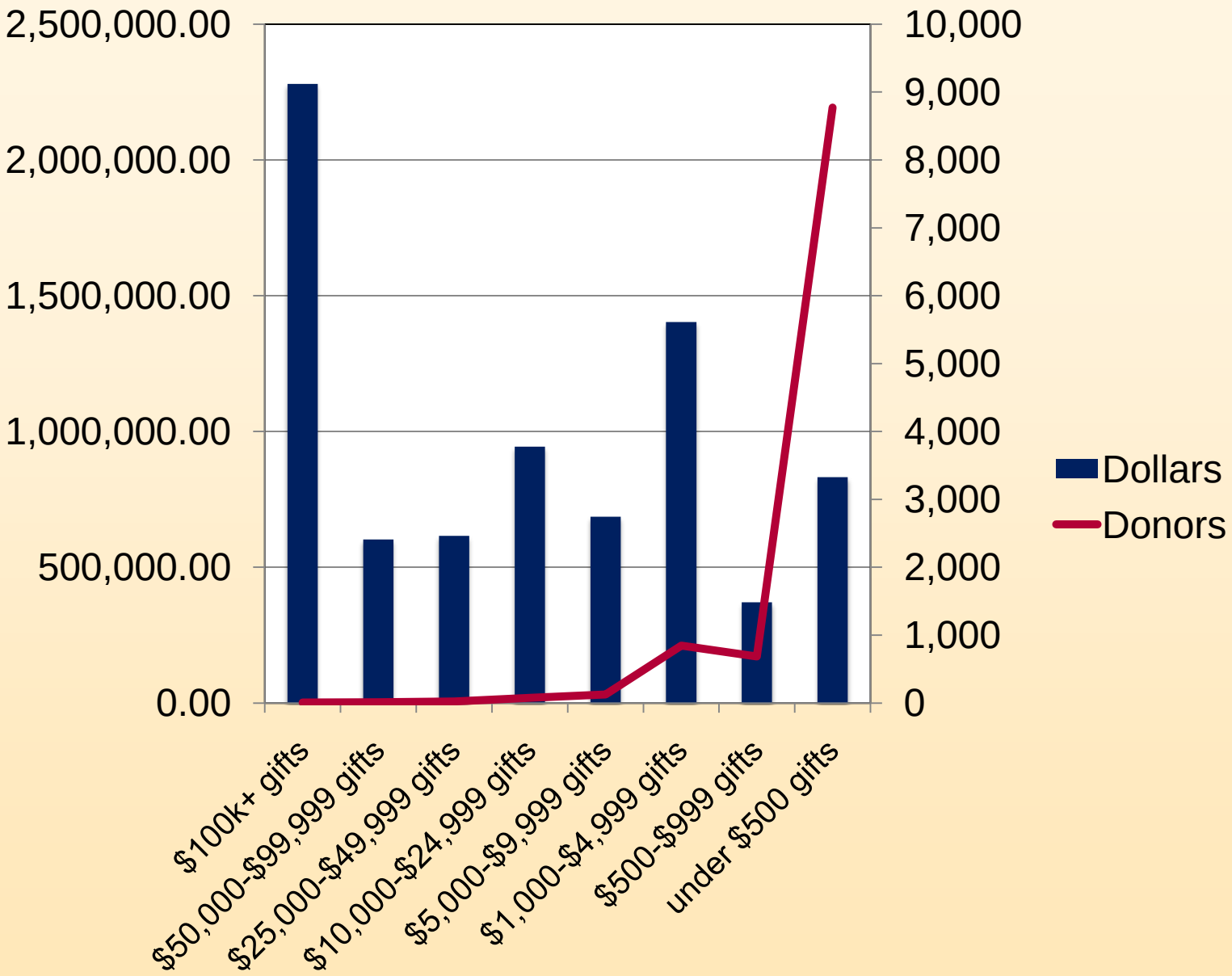
Sources of Revenue

Trustees	**$752,051**
Alumni/ae	**$4,821,991**
Current Parents	**$490,021**
Past Parents	**$247,868**
GOLD	**$152,387**

Source of Gifts



Dollars by Level



Guiding Your Strategy With Data

Objectives of Annual Giving

- Acquire new donors.
- Renew previous year donors.
- Reactivate lapsed donors.
- Upgrade donors.
- Move donors into the major giving pipeline.
- With leadership annual giving programs, maximize gift officer yields, and qualify new prospects.

Data Understanding: Acquire New Donors

- Number of new donors per year.
- New donors by demographic segments.
- Success rate by appeal type and appeal messaging.
- Success rate by constituent type.
- Lifetime value of new donors.

Data Understanding:
Renew Previous Year's Donors

- Renewal rate: dollars and donors.
- Renewal of first year LYBUNTS.
- Cost to renew vs. the cost to acquire.
- 2-year and 3-year consecutive donor renewal rates.

What is our tipping point for retention?

Data Understanding: Reactivate Lapsed Donors

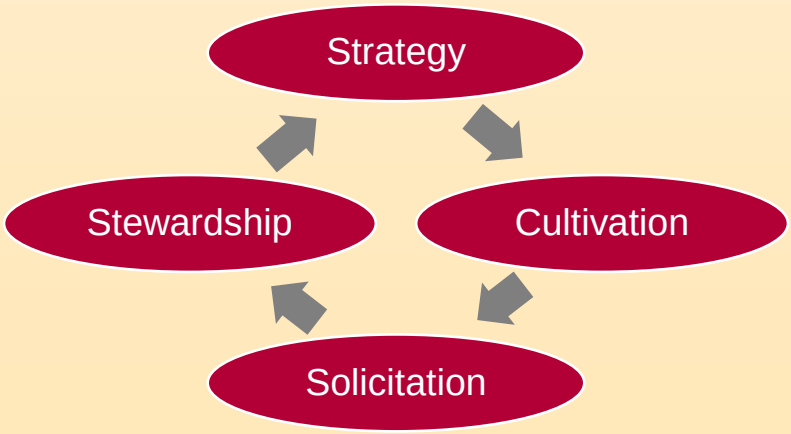
- 3-year SYBUNT reactivation rate.
- 5-year SYBUNT reactivation rate.
- Long-lapsed reactivation rate.
- Cost to reactivate vs. the cost to acquire.
- Cost to reactivate vs the cost to renew.
- When donors reactivate most often. (in relation to campus events, economic factors, calendar month, etc.)

Data Understanding: Upgrade Donors

- Count and percent upgrading per year.
- Dollars from upgrades alone.
- First year LYBUNT percent and dollars. (whether asking for upgrades in first year or not)
- All or all other LYBUNT upgrade percent and dollars.
- Channel upgrade rates. (upgrade better by phone than by mail?)

Data Understanding:
Move Donors Into the Major Gift Pipeline

- Count of prospects produced by year.
- Ongoing annual giving from prospects.
- Dollars per year produced by prospects identified or engaged through the annual fund.



Data Understanding: Leadership Annual Giving Programs

- Percent of capacity acquired by gift officer.
- Target ask amounts vs. capacity.
- Actual ask amounts vs. ask amounts.
- Gift amounts vs. ask amounts.
- Total dollars.
- Total visits.
- Total number of discovery calls made and percent of suspects qualified.
- Total number of assists.
- Dollars produced by hand-offs.

How to Begin

- Identify or build internal capacity.
- Look around your campus.
- Seek professional development opportunities.
- Identify specific areas for growth, then know everything you can about where you are starting from.

Thank you