

Using Your Donor Database to Find Gold

Donor Profile and Performance Analysis (sample data)

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For every child
Health, Education, Equality, Protection
ADVANCE HUMANITY

unicef 

Identifying your Donors

We need to have the ability to manage the donor relationship, so that each person feels as though we know them personally.

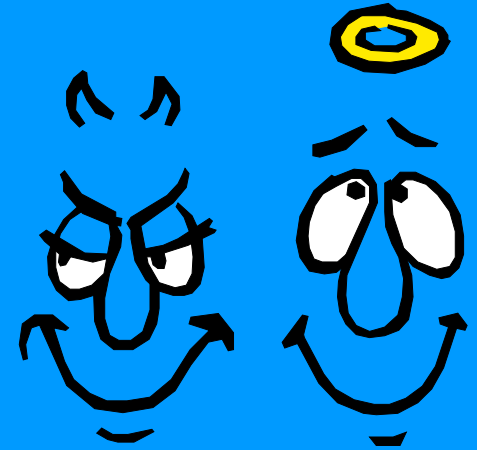


Our Supporters!

Who are my supporters?

What are they doing?

Are they all the same?



One Off Donors

Pledge Donors

Annual Donors

Event Participants

New Donors

Transition Donors

Core Donors

Volunteers

Top donors

Major Donors

Lapsed Donors

Deeply Lapsed or Inactive donors

etc...etc..etc..

Knowing your data

Unless you analyze your database, you will never know who they are or what is an asking limit.

This is an ultimate asking:
“How high is high?”

To distinguish between what is nice to know and what is useful to identify.

Donor Performance Index

- What rate is the programme growing.
- How large is the typical gift and how has gift size changed over time.
- What is the frequency of giving and how has the frequency of giving changed over time.
- How long have donors been giving and how much money are donors worth over the life time.
- What are donors' renewal rate and attrition rates.
- Who are my core donors?

Donor Performance Index

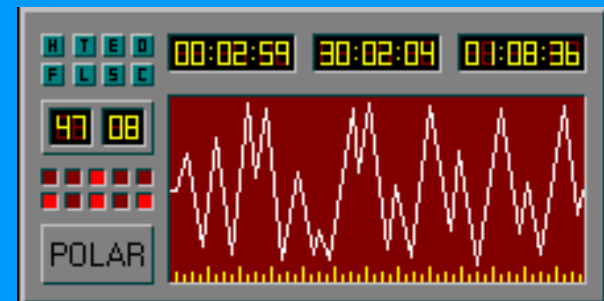
- How many lapsed donors do I have?
- How much revenue do my lapsed donors represent?
Which lapsed donors are worth resoliciting?
- Who is upgrading their support, who is downgrading, and what is the pattern?
- Which donors respond to which appeals?
- How many donors give more than one donation this year, last year?
- How long you have to wait to get a 2nd gift?
- How many major donors do I have?

INCENTIVE

- Sophisticated fundraising programmes have complex donor portfolios and a unique series of considerations – an extraordinary tool is needed to clarify the pictures.

PURPOSES

- Benchmark donor performance
- Set appropriate performance expectations
- Income Projection
- Campaign Planning
- Donor Cultivation and Communication
- Decision Making
- Maximize donor value



APPROACH

- Past and current donor behaviours are:
 - The best performance indicators of a direct marketing programme

METHODOLOGY

Premises to segmentation

- Donor value is directly linked to donor loyalty
- Loyalty is the (most) important donor performance criterion
i.e. the more loyal a donor, the better the performances

The Donor Life Stages

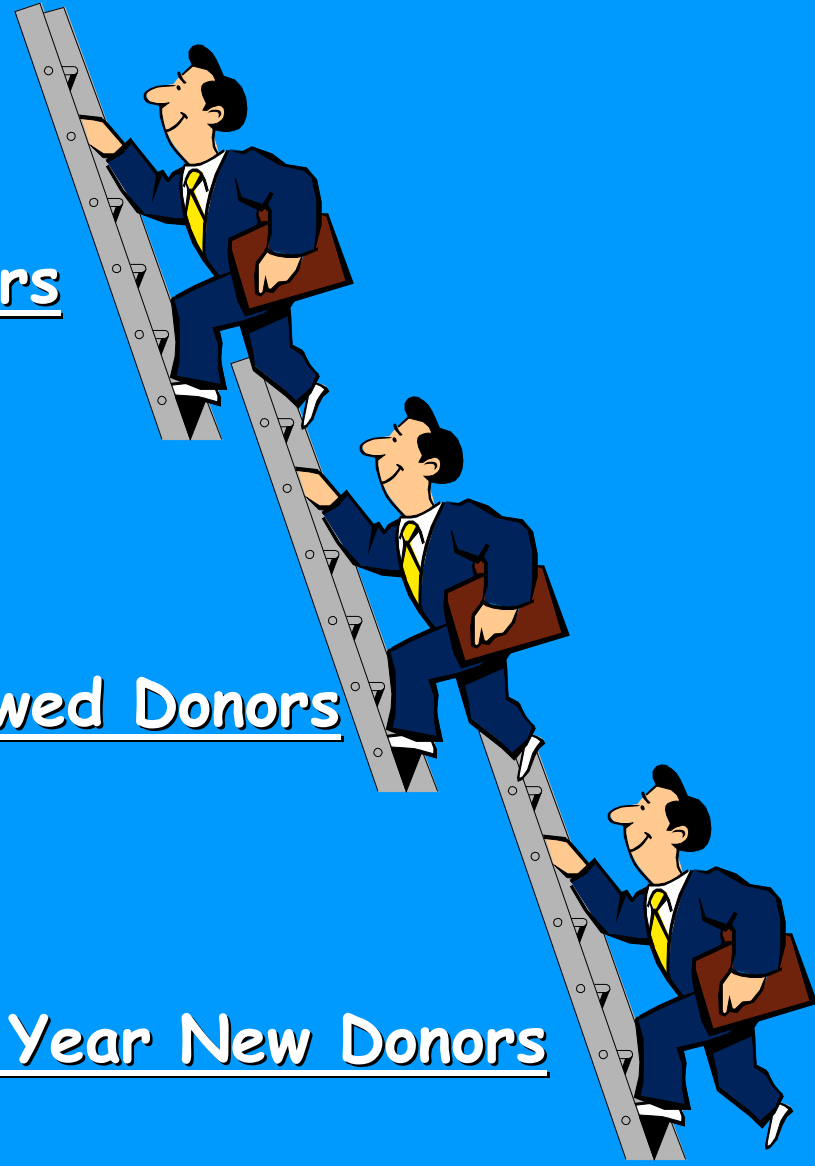
3rd Year Core Donors

2nd Year Renewed Donors

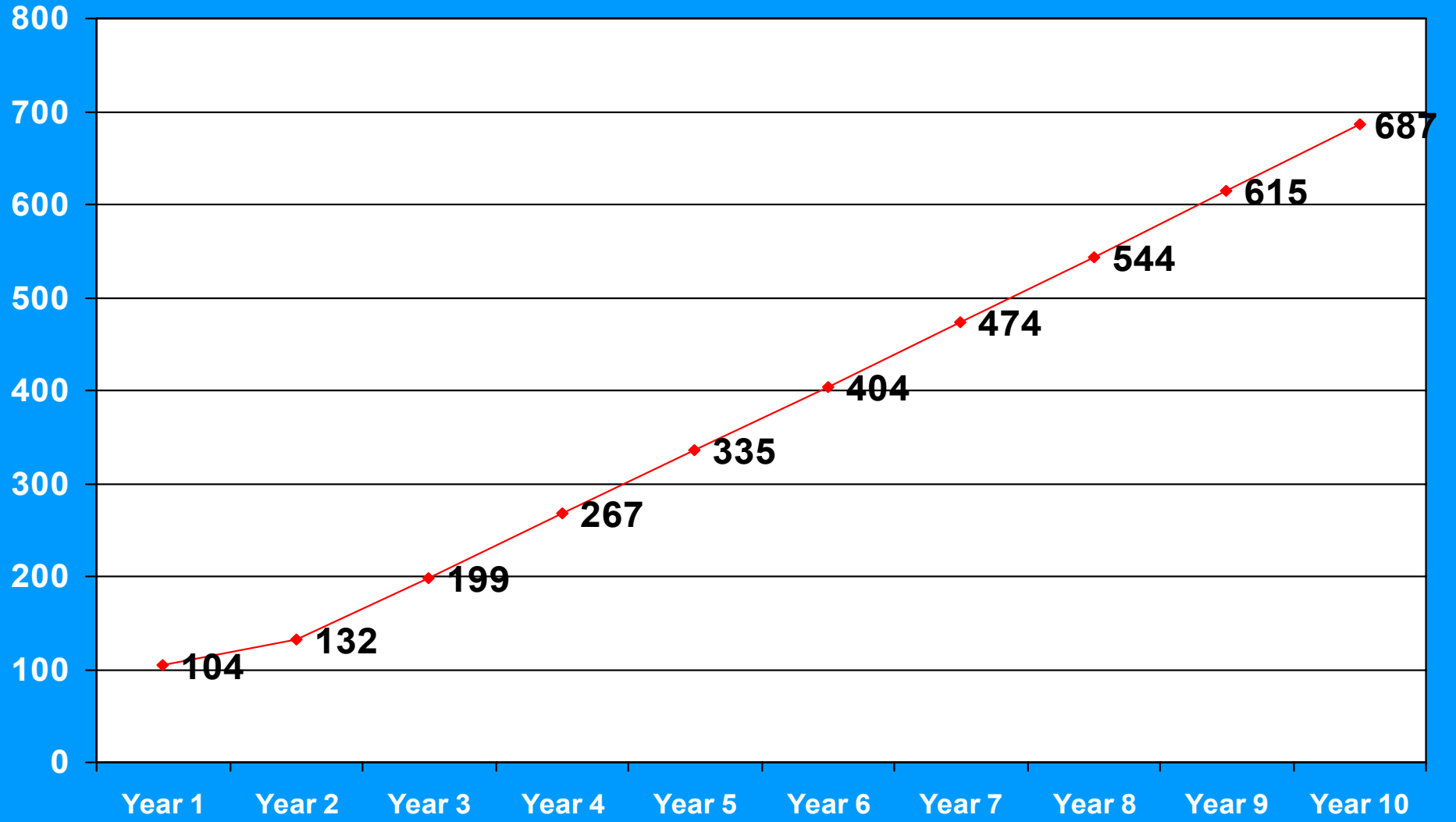
1ST Year New Donors

Lapsed

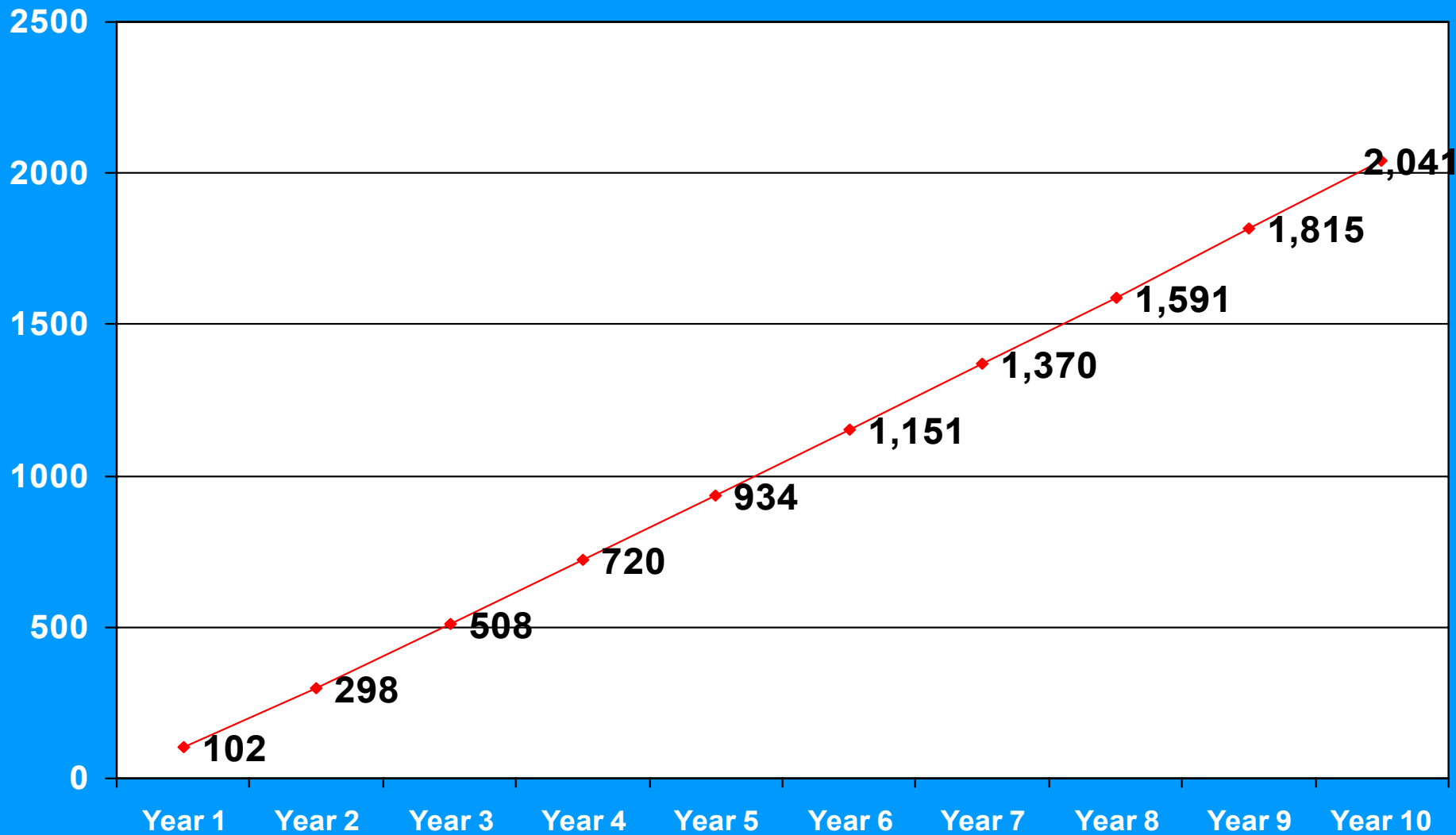
Inactive



LTV (One-Off Donors)



LTV (Pledge Donors)



Useful Data Fields

- First donation date & amount
- Initial campaign/appeal code
- Last donation date & amount
- Last campaign/appeal code
- Maximum donation date & amount
- Highest donation amount per year
(At least past 5 yrs history)
- Year to date total donations and number of gifts
- Last year total donations and number of gifts
- 2 years ago total donations and number of gifts
- 3 years ago total donations and number of gifts
- 4 years ago total donations, etc.

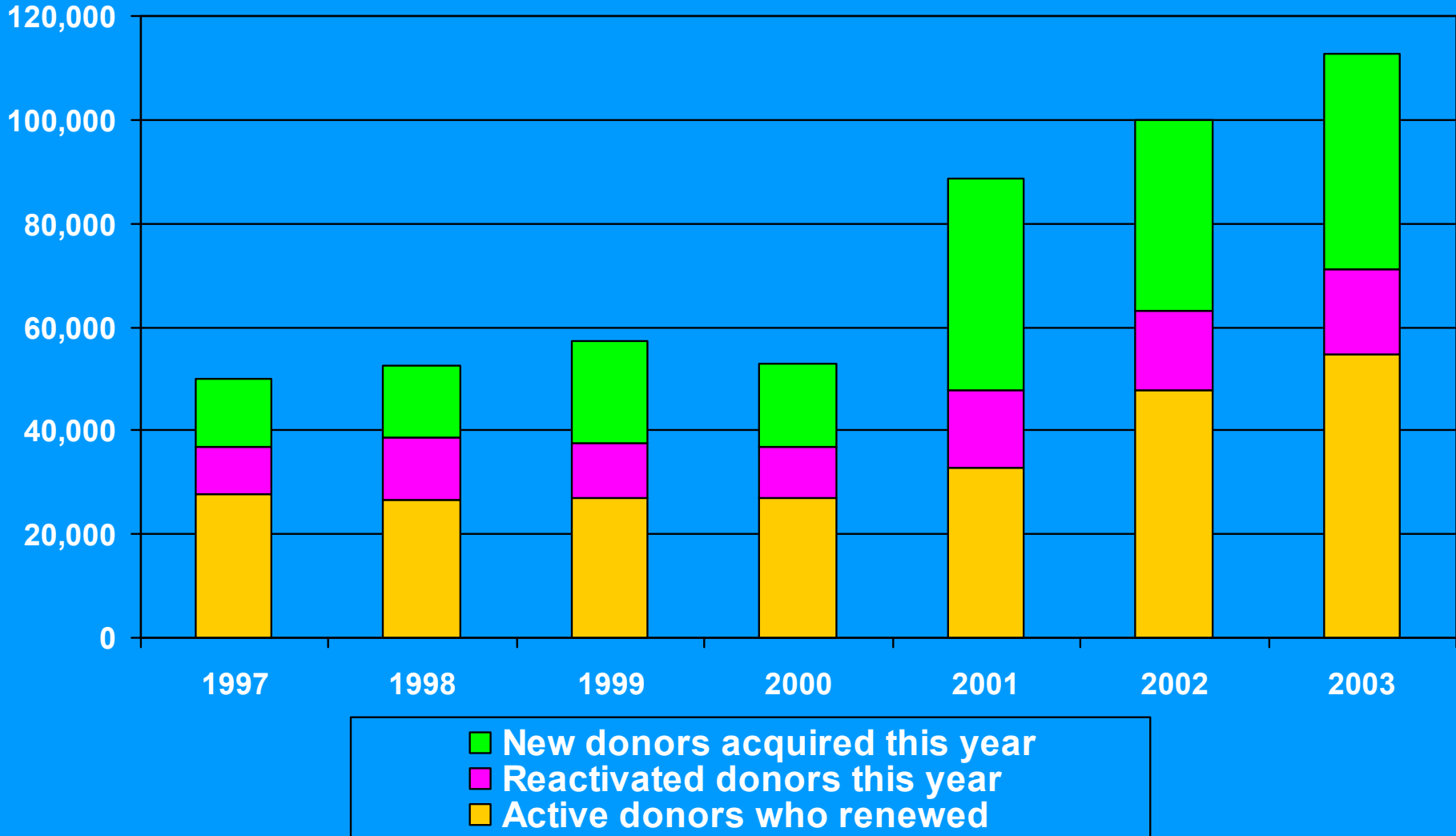
Useful Data Fields

- Grand total (Cumulative total)
- Total number of gift (Cumulative total)
- Average donation amount per year
(At least past 7 years)
- Last contact date
- Last contact code or type
- Source code or mailing code
- Data update posted fields
(i.e. address, phone, last name, email)
- Upgrade – downgrade indicators (both one off and pledge)
- User defined calculation fields, i.e. Max and Min Value,
Linear regression analysis, count, total, average, etc.

Donor Growth Table

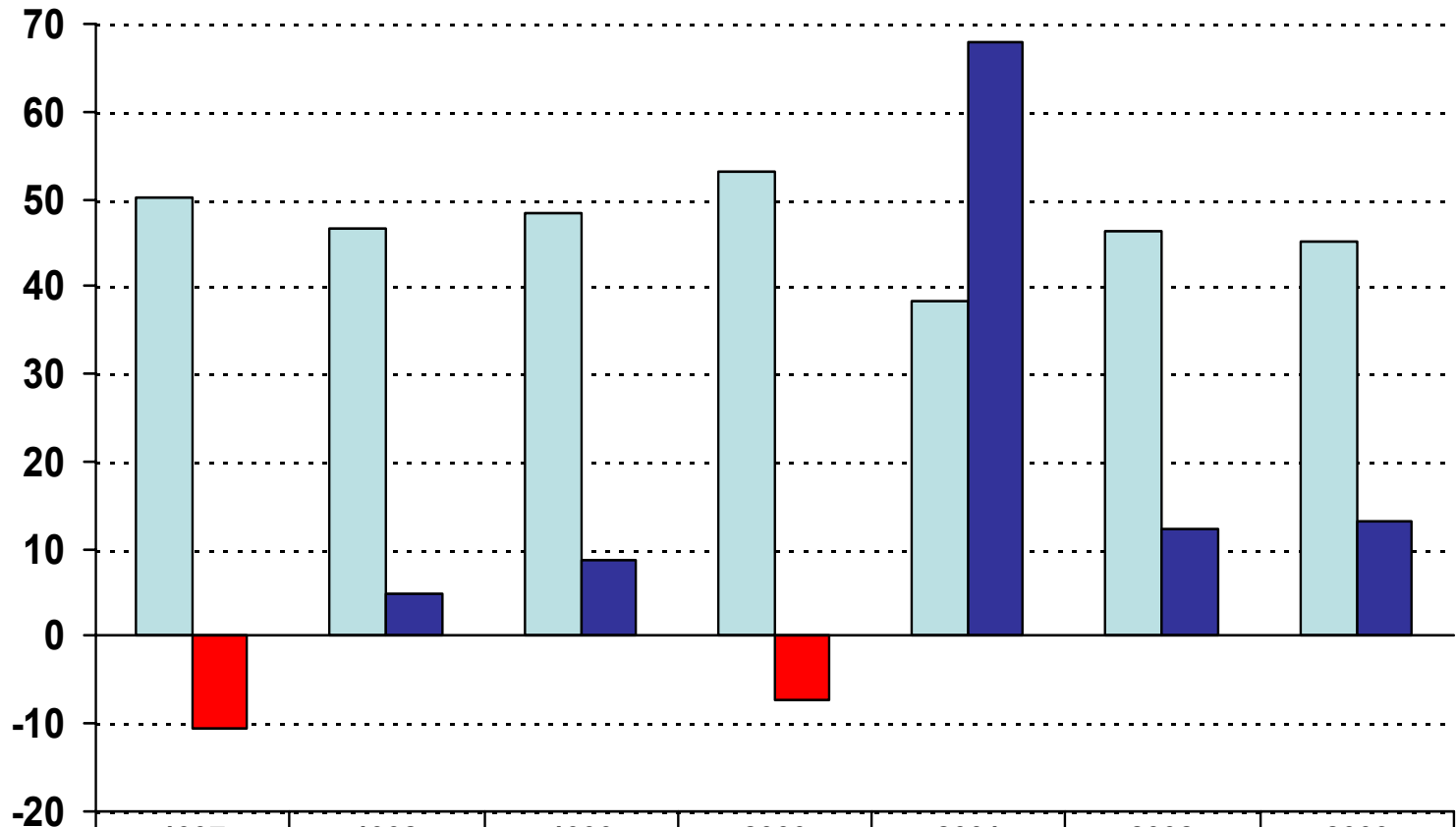
Active Donors:	1997	1998	1999	2000	2001	2002	2003	
- In previous year	55,902	49,999	52,489	57,089	52,877	88,775	99,791	
- In previous year who gave this yr.	27,839	26,635	27,144	26,857	32,674	47,641	54,865	
Donors lost through attrition this year	28,063	23,364	25,345	30,232	20,203	41,134	44,926	
Inactive donors at beginning of yr.	120,388	139,341	150,650	165,725	186,055	191,290	217,120	
Reactivated donors this year	9,110	12,055	10,270	9,902	14,968	15,304	16,086	
New donors acquired this year	13,050	13,799	19,675	16,118	41,133	36,846	41,875	
Total active donors at end of year	49,999	52,489	57,089	52,877	88,775	99,791	112,826	
Attrition rate before replacement by new donors	50.2%	46.7%	48.3%	53.0%	38.2%	46.3%	45.0%	41.0%
Net growth after attrition	-10.6%	5.0%	8.8%	-7.4%	67.9%	12.4%	13.1%	11.1%

Active Donor Growth



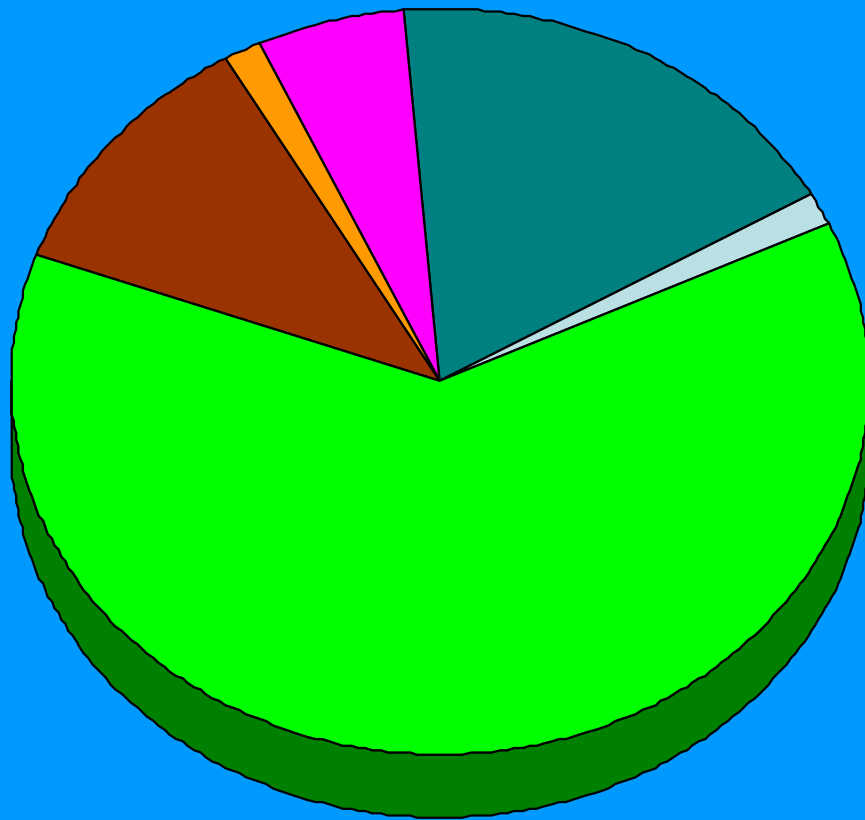
Net Donor Growth







%



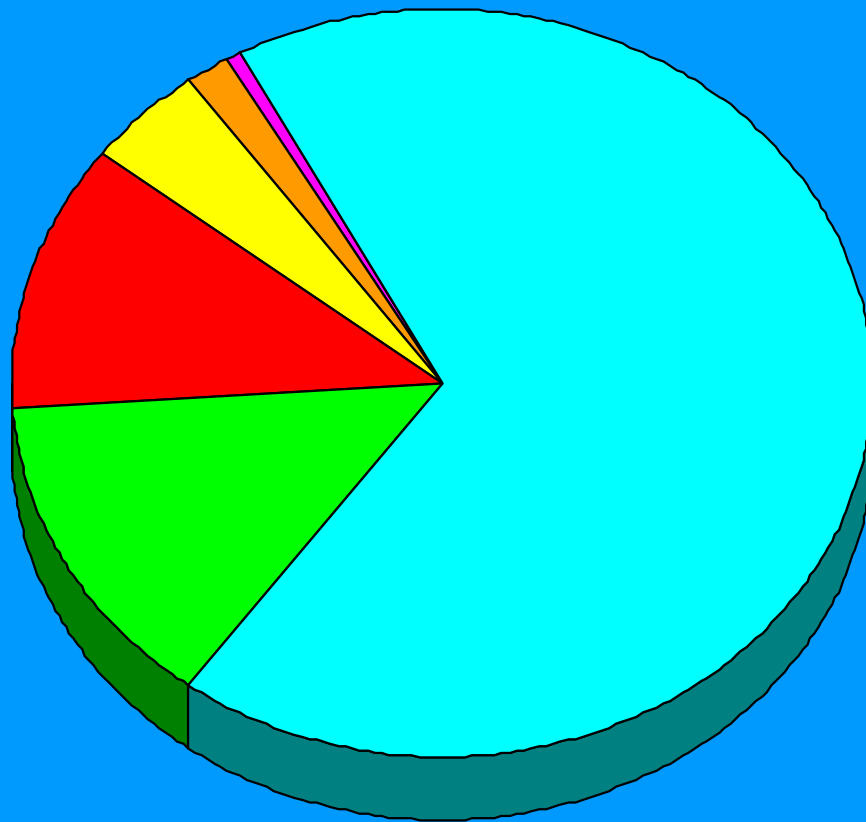
	1997	1998	1999	2000	2001	2002	2003
Attrition before new donors	50.2	46.7	48.3	53	38.2	46.3	45
Net growth after attrition	-10.6	5	8.8	-7.4	67.9	12.4	13.1

Source of Contributions



 Groups & Assoc's	1.4%
 Companies	5.4%
 Estates	18.0%
 Foundations	1.5%
 Individuals	62.6%
 Major Donors	11.1%

Contribution Channels

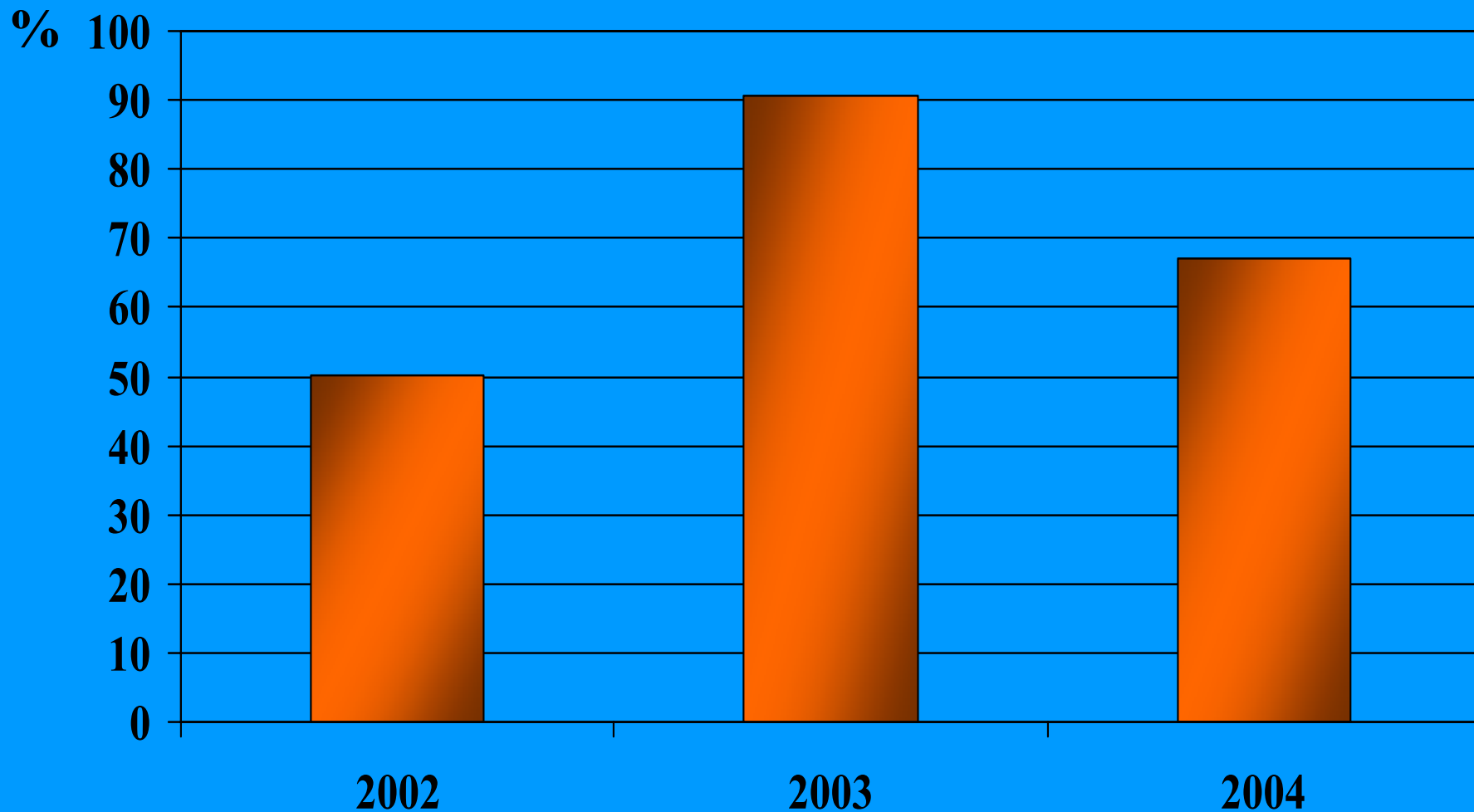


Corporate Partnerships	1.5%
Direct Mail	67.7%
Pledge	14.1%
Legacy	11.7%
Special Events	4.5%
Media	0.5%

Comparative Income analysis

	<i>Number of Gifts</i>			<i>Amount</i>			<i>Average Gift</i>		
	01/01/2003 31/12/2003	01/01/2002 31/12/2002	% Var	01/01/2003 31/12/2003	01/01/2002 31/12/2002	% Var	01/01/2003 31/12/2003	01/01/2002 31/12/2002	% Var
	Year-to-Date	Previous Year		Year-to-Date	Previous Year		Year-to-Date	Previous Year	
\$0---->	7398	6060	22	182,176.56	166,586.18	9	24	27	-10
\$50---->	2168	1928	12	114,305.50	101,518.35	12	52	52	0
\$100---->	3086	3027	1	421,243.64	406,971.27	3	136	134	1
\$500---->	73	70	4	43,604.41	41,521.52	5	597	593	0
\$1000---->	80	67	19	126,538.26	106,821.34	18	1,581	1,594	-0
\$5000---->	6	8	-25	34,000.00	40,000.00	-15	5,666	5,000	13
\$10000---->	1	5	-80	27,500.00	108,879.95	-74	27,500	21,775	26
House list, direct mail	12812	11165	14	949,368.37	972,298.61	-2	74	87	-14
\$0---->	16	8	100	490.00	195.00	151	30	24	25
\$50---->	2	3	-33	100.00	165.00	-39	50	55	-9
\$100---->	9	2	350	1,180.00	300.00	293	131	150	-12
House list, pledge	27	13	107	1,770.00	660.00	168	65	50	29
\$0---->	17993	6138	193	240,764.51	71,293.71	237	13	11	15
\$50---->	710	583	21	35,790.50	29,900.00	19	50	51	-1
\$100---->	232	178	30	29,140.00	21,620.00	34	125	121	3
\$500---->	9	4	125	4,800.00	2,000.00	140	533	500	6
\$1000---->	5	2	150	6,000.00	2,000.00	200	1,200	1,000	20
Prospecting, direct mail	18949	6905	174	316,495.01	126,813.71	149	16	18	-9

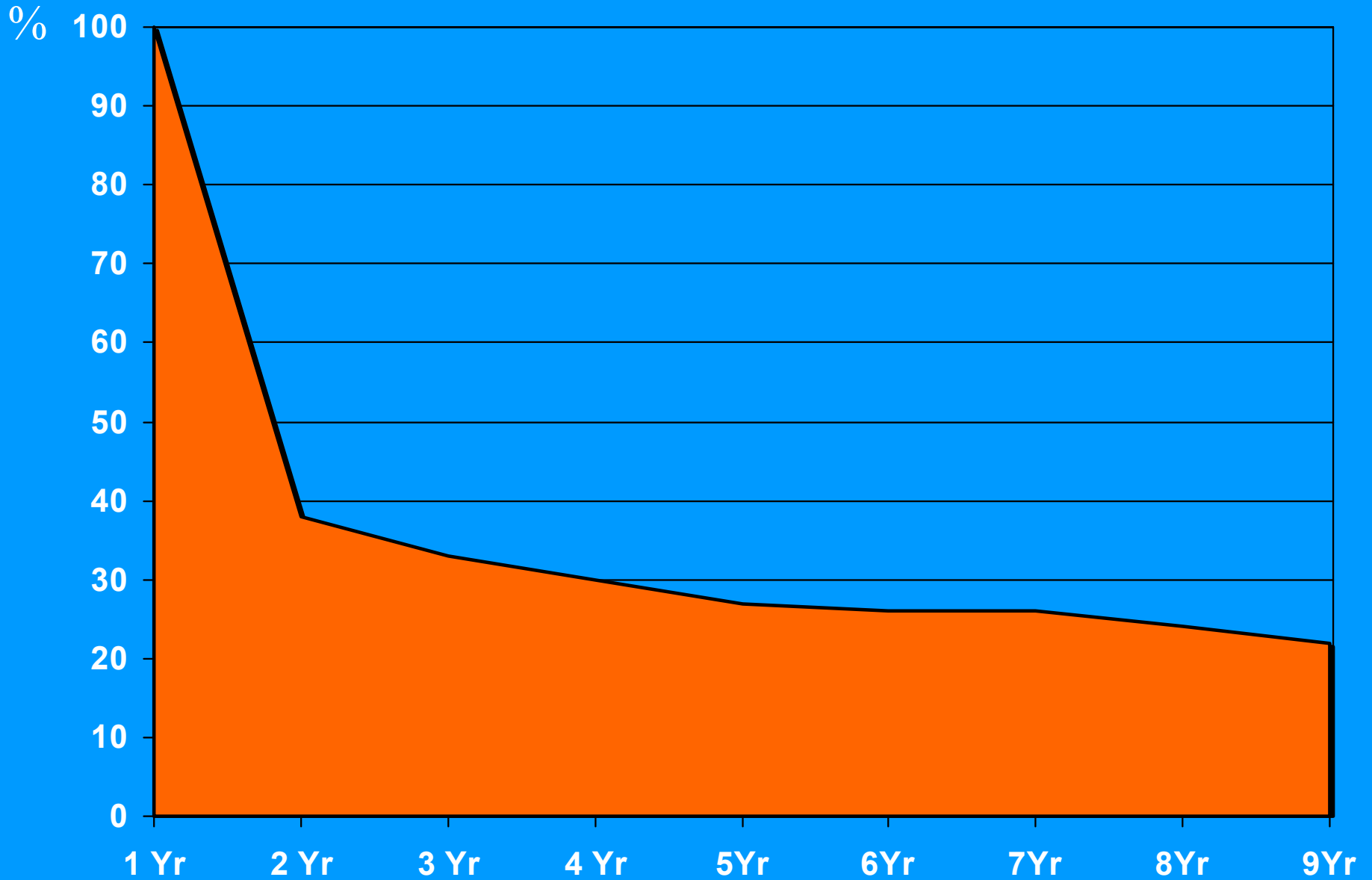
% of New Pledge Donors Acquired through Conversion from House Donor File



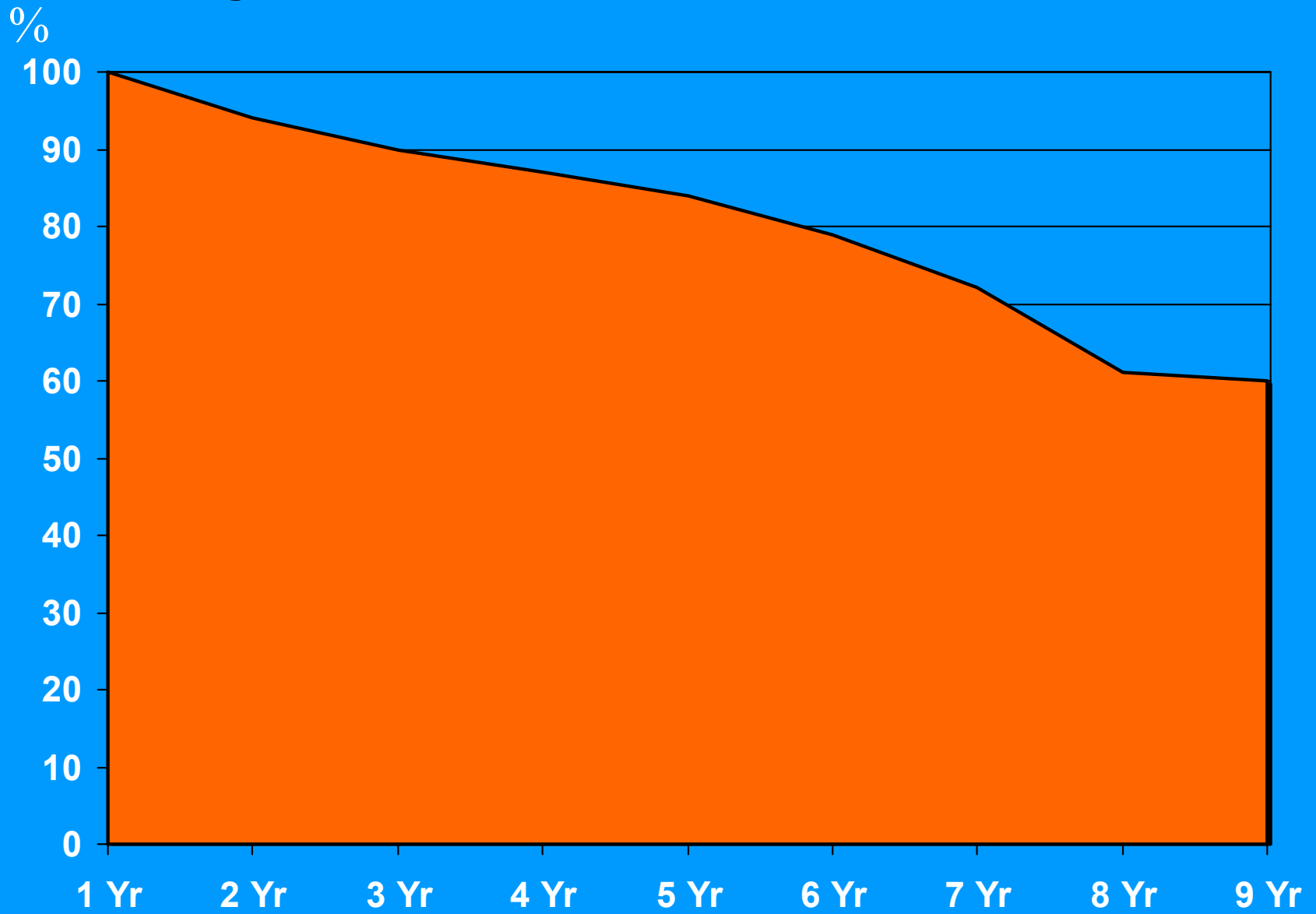
Retention Rate and Attrition

1997	1998	1999	2000	2001
14,651	4,175 28.50	3,446 23.52 82.54	2,828 19.30 82.07	3,069 20.95 108.52
	14,874	4,150 27.90	3,313 22.27 79.83	3,559 23.93 107.43
		20,608	4,781 23.20	5,418 26.29 113.32
			16,847	6,544 38.84
				43,276

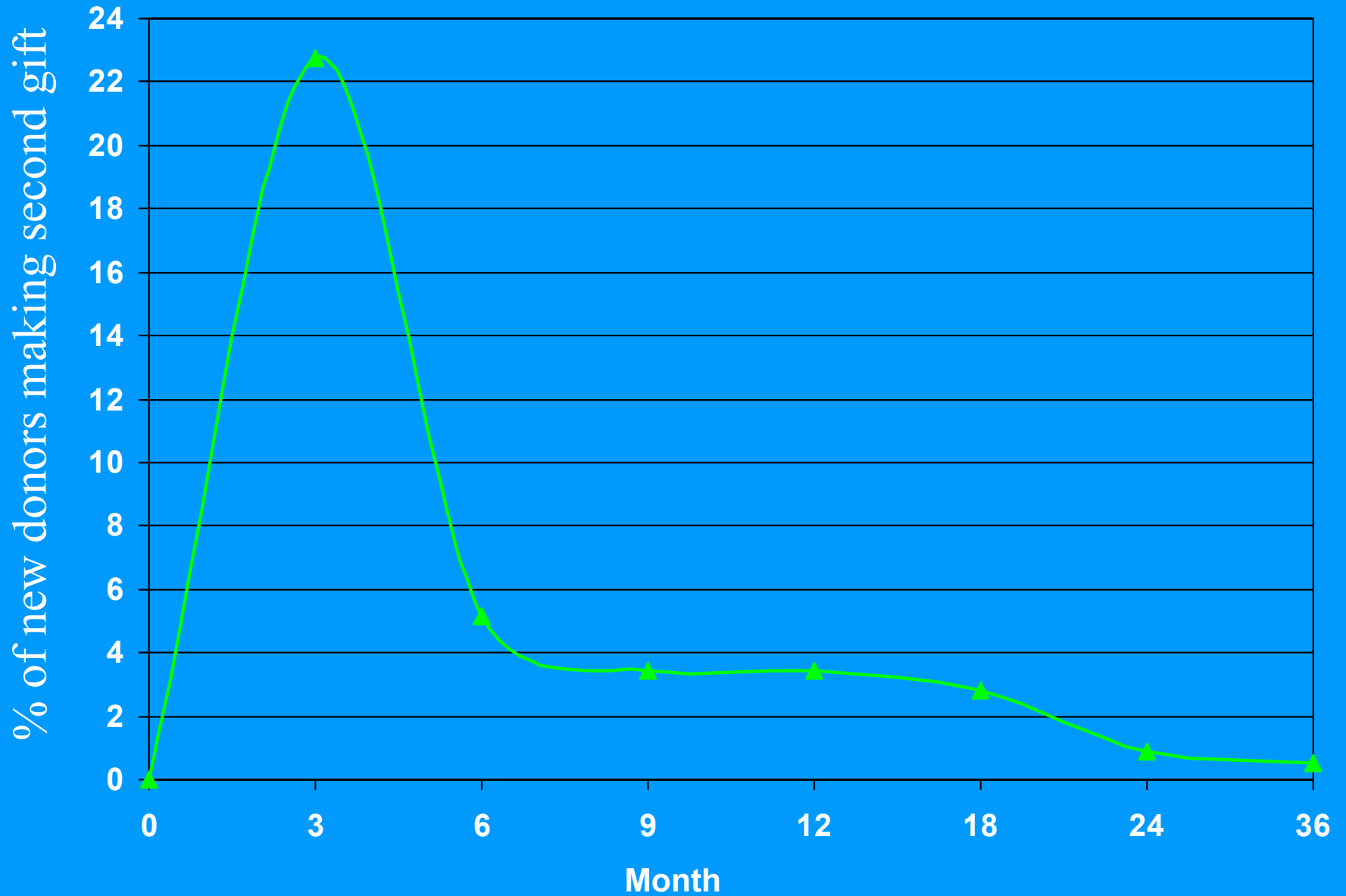
One-Off Donor Retention



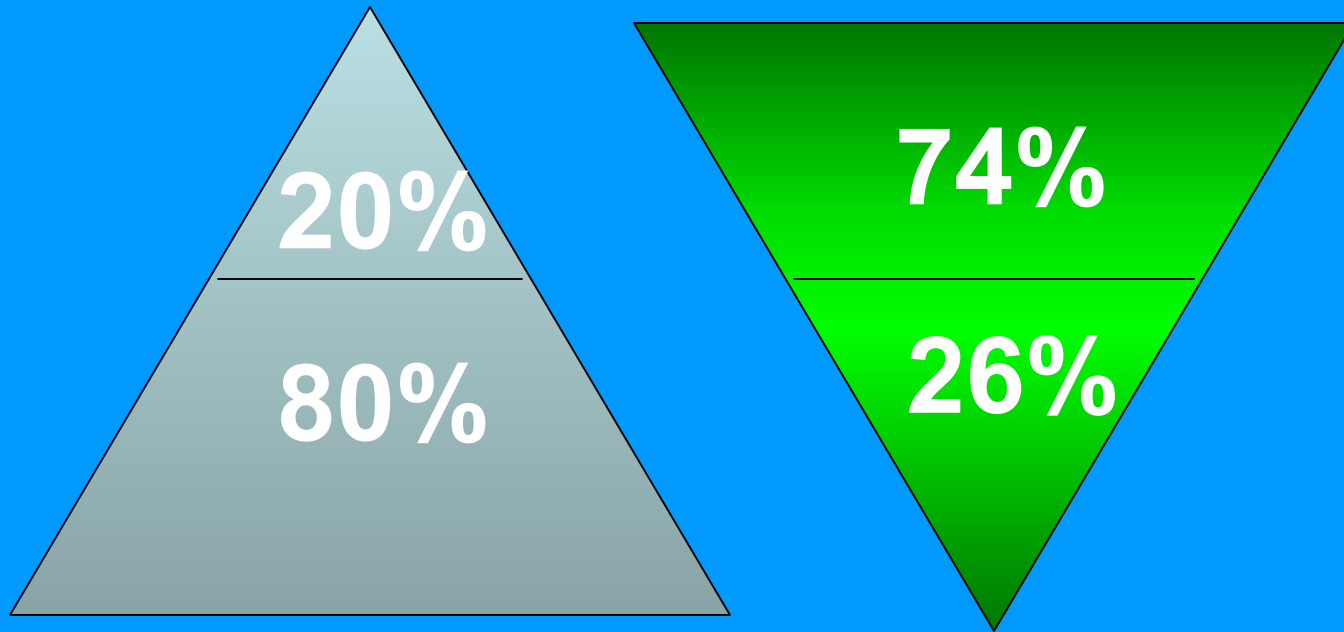
Pledge Donor Retention



The 2nd Gift Window



20-80 Analysis (Individual donors)



20-80 Analysis (Individual donors)

Major Donor List - Percentage Top 20%

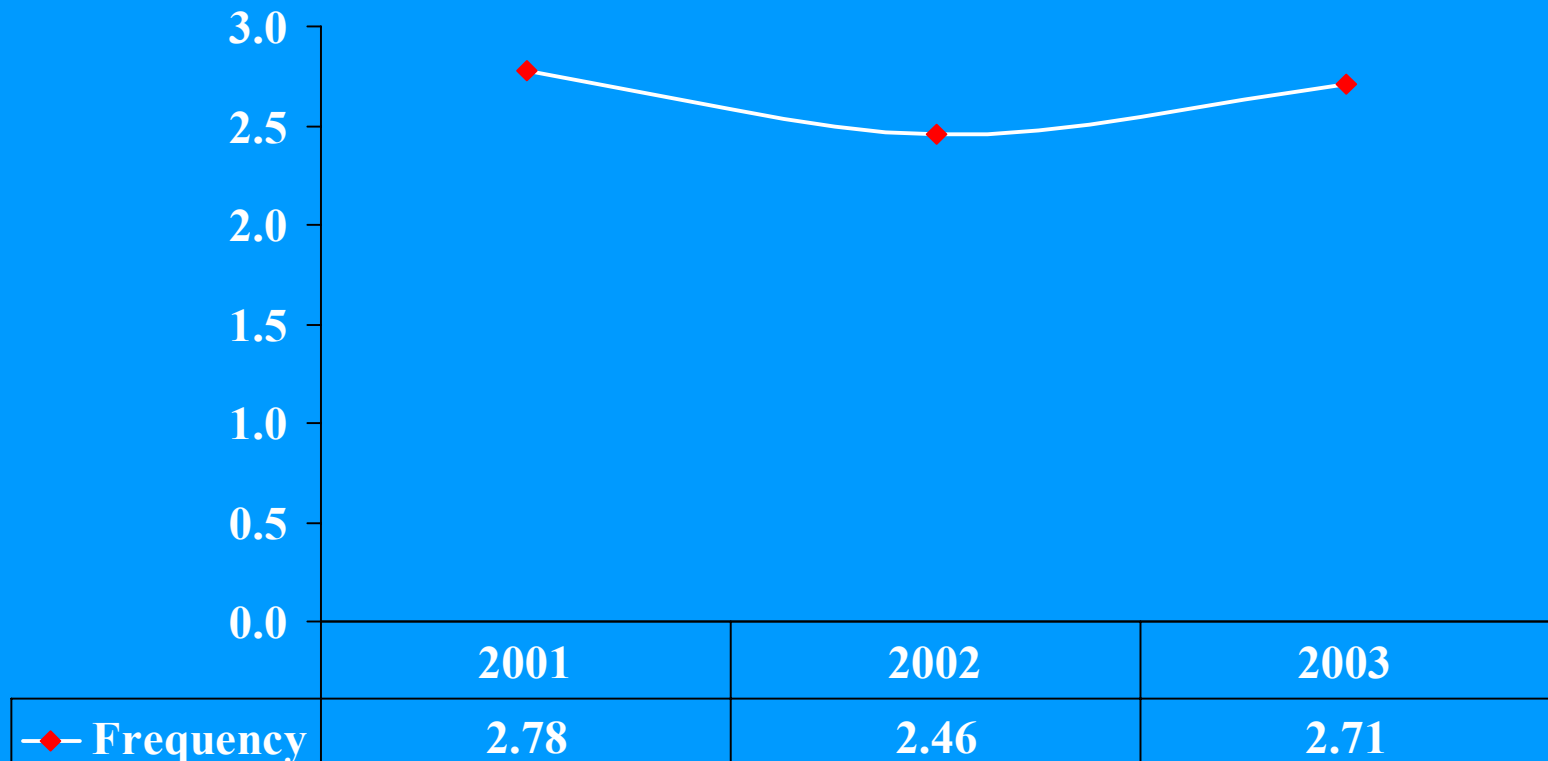
Position	ID Number	Name	Last Date	Amount
1	142	Mr. Tanako Yee	02/02/2004	\$140,000
2	56	Mr. King Kong	03/05/2004	\$105,000
3	155	Mr. Jean Francois Chambuad	03/12/2004	\$72,000
4	134	Mrs. Laura Colassano	03/23/2004	\$55,000
5	14	Mr. Chan Hemsin	03/23/2004	\$50,000
6	356	Ms. Mary Smooth	03/23/2004	\$25,000
7	1789	Mr. Richard Pordes	04/02/2004	\$25,000
8	2134	Mr. David Alonti	04/12/2004	\$25,000
9	456	Ms. Ann White	04/16/2004	\$10,000
10	709	Mr. John Motte	04/22/2004	\$10,000

Number	%	Total	%
72	20.00	1,498,416.67	74.26
289	80.00	519,400.00	25.74
361	100.00	2,017,816.67	100.00

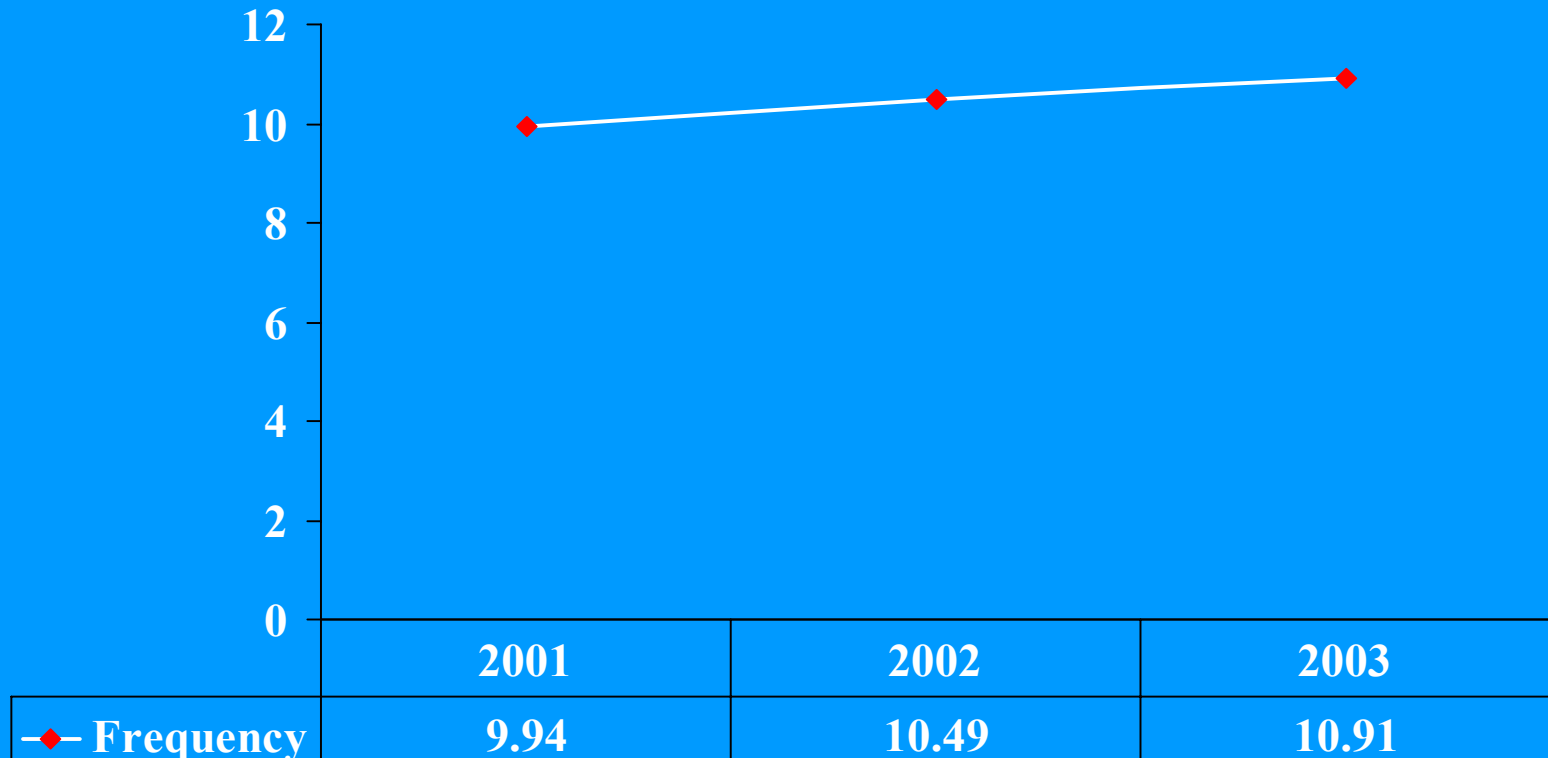
First gift vs. last gift (Individual - One-Off)

Initial Donation		1,000+	500-999	250-499	100-249	Less than 100	No 2nd gift
1,000+	92	17	3	1	7	7	57
500-999	168	9	14	9	20	8	108
250-499	188	4	6	13	30	36	107
100-249	4,588	27	37	65	1,065	865	2,529
Less than 100	177,893	64	93	179	6,159	75,614	95,784

House Donor Frequency Index (One-Off)

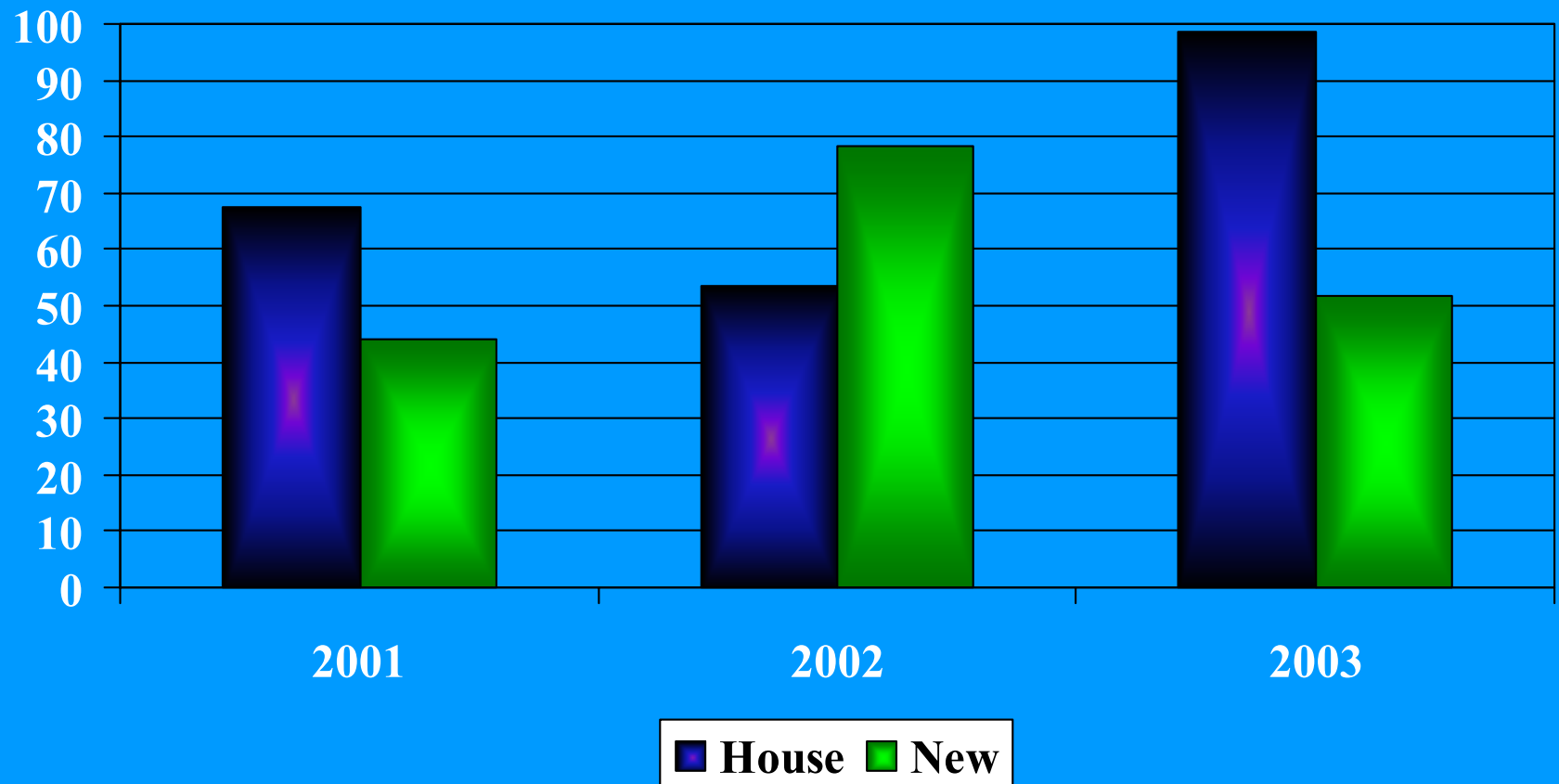


House Donor Frequency Index (Pledge)



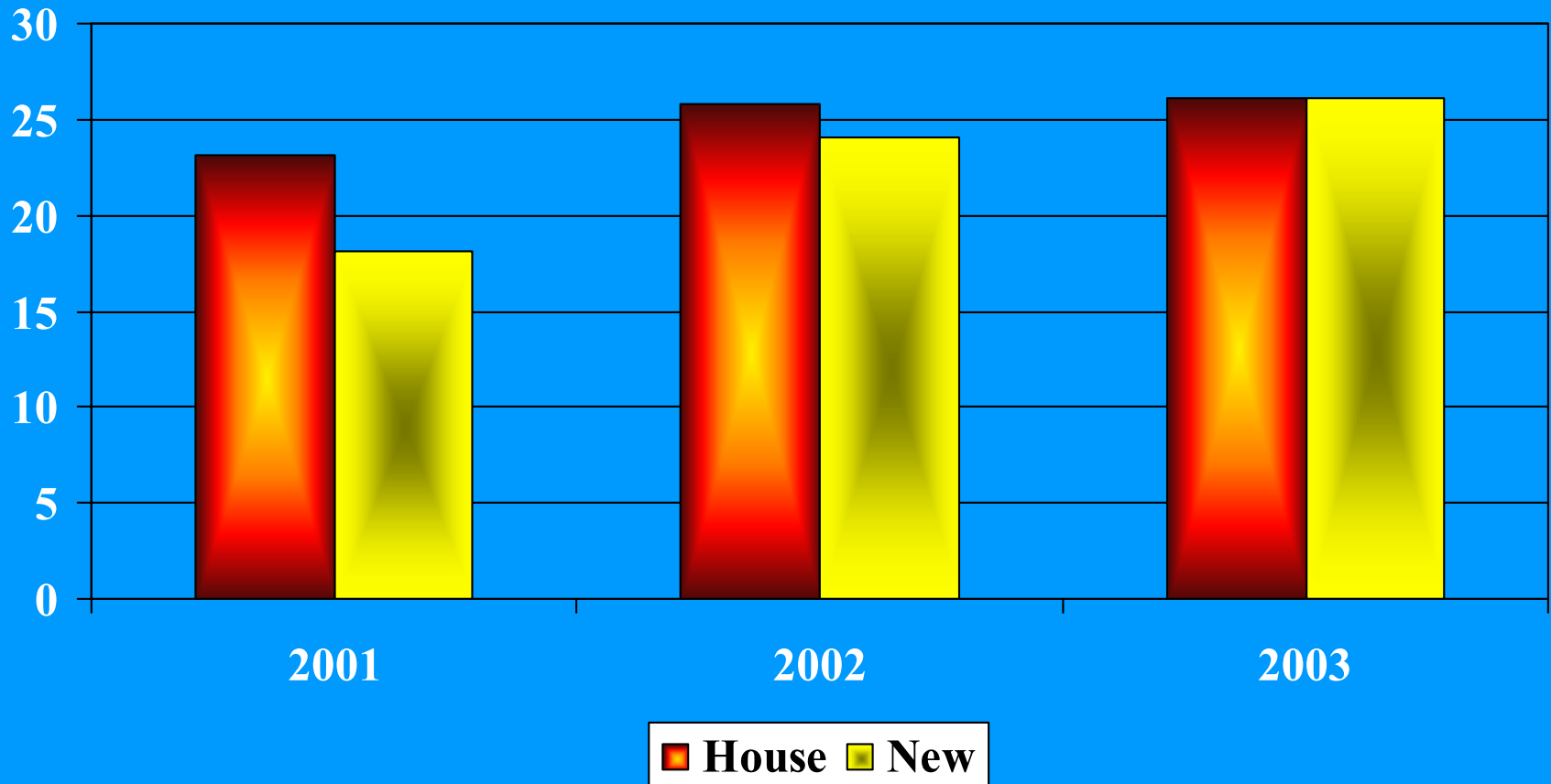
Average gift (One-off donors)

IN US\$



Criteria donations < \$500

Average gift (Pledge donors)



One-Off Donor Matrix

E.g. List: H11

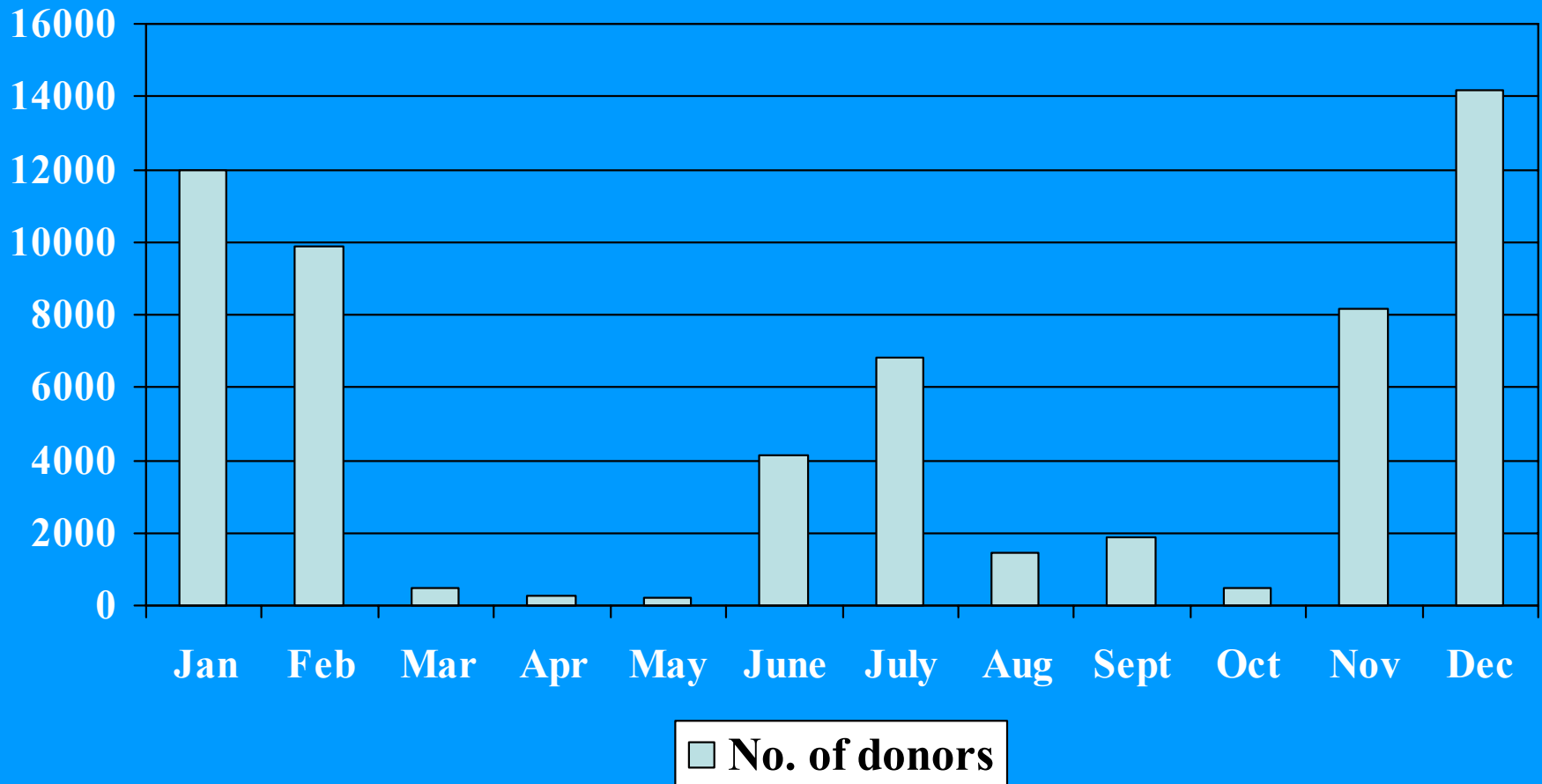
Total received	Amount	# of donors	Average per donor	# of gifts	Average per gift
1000+:	24,951.25	8	3,118.91	16	1,559.45
101 - 1000:	8,017.00	19	421.95	76	105.49
51 - 100:	380.00	27	14.07	5	76.00
26 - 50:	2,290.00	28	81.79	69	33.19
10 - 25:	50.00	2	25.00	2	25.00
Less than 10:	1,432.00	55	26.04	148	9.68
Total	37,120.25	139	267.05	316	117.47

Gift Frequency	Amount	# of donors	Average per donor	# of gifts	Average per gift
One gift only:	25,064.25	61	410.89	61	410.89
Two gifts:	2,522.00	45	56.04	90	28.02
3 gifts:	2,290.00	11	208.18	33	69.39
4 gifts:	1,855.00	3	618.33	12	154.58
5 gifts:	2,522.00	6	420.33	30	84.07
6 gifts:	725.00	4	181.25	24	30.21
7+ gifts:	2,142.00	9	238.00	66	32.45
Total:	37,120.25	139	267.05	316	117.47

Number of responses to the number of mailings received by the donor

Mail Segment Qty: 10,000		Responses								
Mails received	1	2	3	4	5	6	7	8	9	Total
1	4770									4770
2	2448	947								3395
3	1945	656	431							3032
4	1368	428	146	65						2007
5										
	10531	2031	577	65						13204

Seasonal Donors' giving patterns



Core Donors Giving Trends

2004	2003	2002	2001	2000	Number of gifts	Number of donors	Total between 2004 - 2000	Annual Average
●	●	●	●	●	193	8	7,978,520	199,463
●	●	●	●		9	1	16,500	4,125
●	●	●		●	5	1	5,000	1,250
●	●	●			222	5	247,376	12,368
●	●		●	●	0	0	0	0
●	●		●		3	1	35,500	11,833
●	●			●	6	2	3,200	533
●	●				594	257	6,484,584	12,615
●		●	●	●	6	1	251,832	62,958
●		●	●		6	2	3,700	616
●		●		●	0	0	0	0
●		●			24	12	46,655	1,944
●			●	●	0	0	0	0
●			●		4	2	8,000	2,000
●				●	4	2	2,100	525
●					840	784	1,431,827	1,826
Sub-total for: 2004					1,916	1,078	16,514,796	

Lapsed Donors Giving Trends

2004	2003	2002	2001	2000	Number of gifts	Number of donors	Total between 2004 - 2000	Annual Average
	●	●	●	●	23	2	6,500	812
	●	●	●		30	3	61,850	6,872
	●	●		●	0	0	0	0
	●	●			38	14	301,760	10,777
	●		●	●	11	3	14,900	1,655
	●		●		6	3	11,200	1,866
	●			●	7	2	3,100	775
	●				3,910	3,762	4,003,503	1,064
Sub-total for: 2003					4,018	3,787	4,402,814	

Thank You