

# FIA Conference 2024

Where **passion**  
meets **purpose**

Brisbane  
28 Feb – 1 Mar

FIA CONFERENCE

# Donor Retention Insights from Benchmarking High Performers

INDIVIDUAL GIVING TRACK

Fi McPhee: [fi.mcphee@benchmarkingproject.org](mailto:fi.mcphee@benchmarkingproject.org)

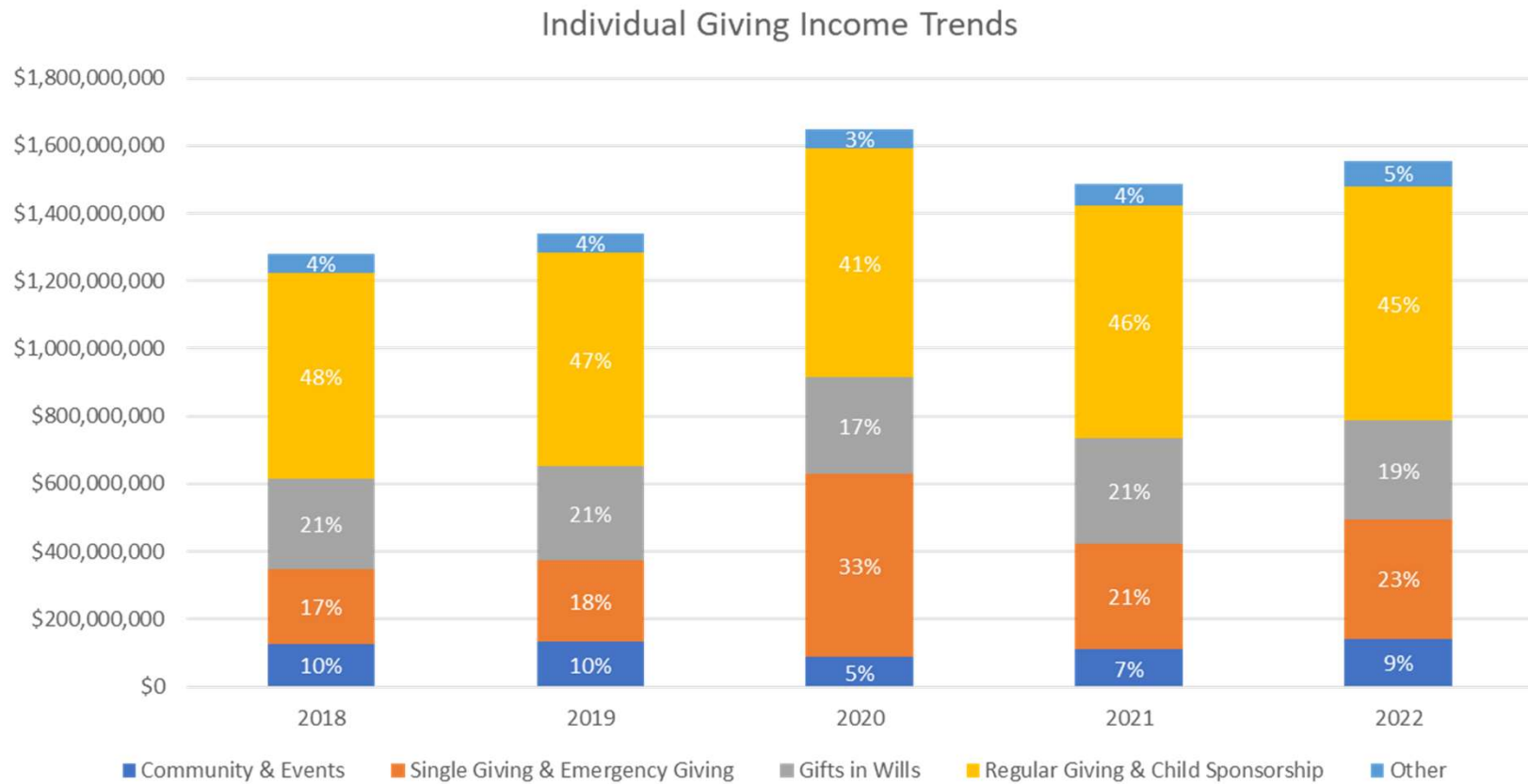
The Benchmarking Project: [www.benchmarkingproject.org](http://www.benchmarkingproject.org)



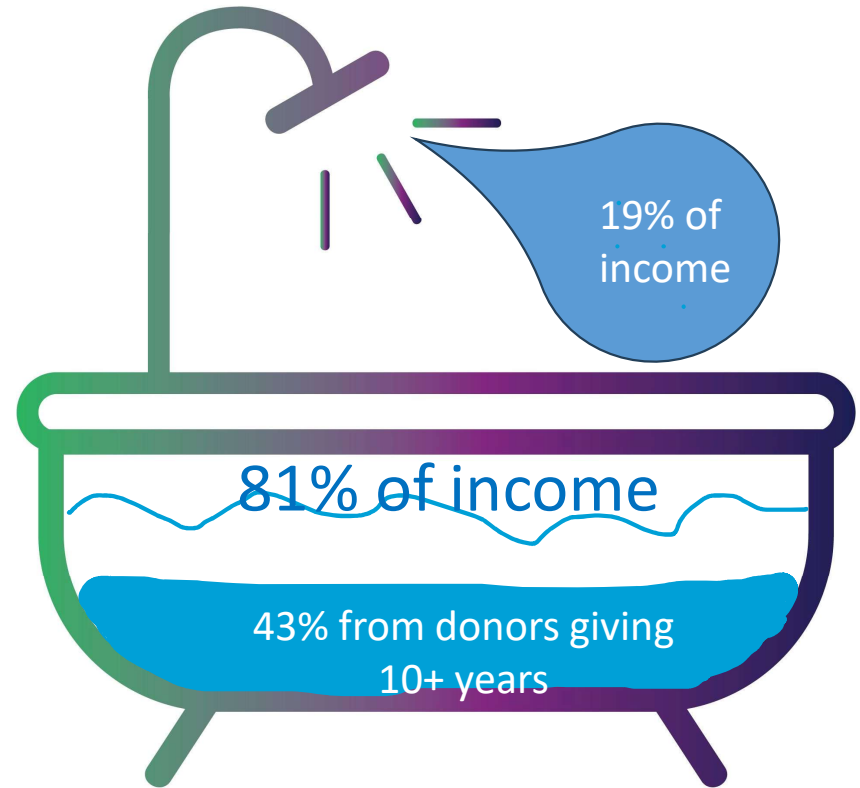
Individual Giving Track  
Sponsored By:

**RobeJohn**

# Individual Giving showing resilience and growth

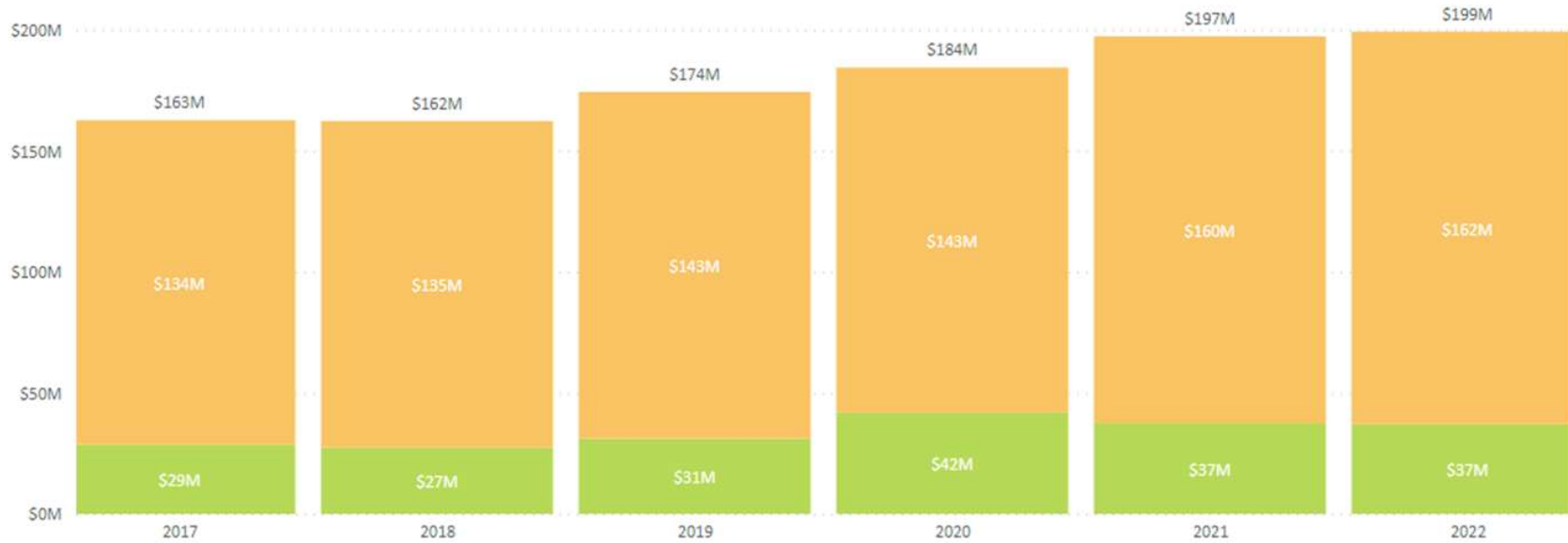


3x

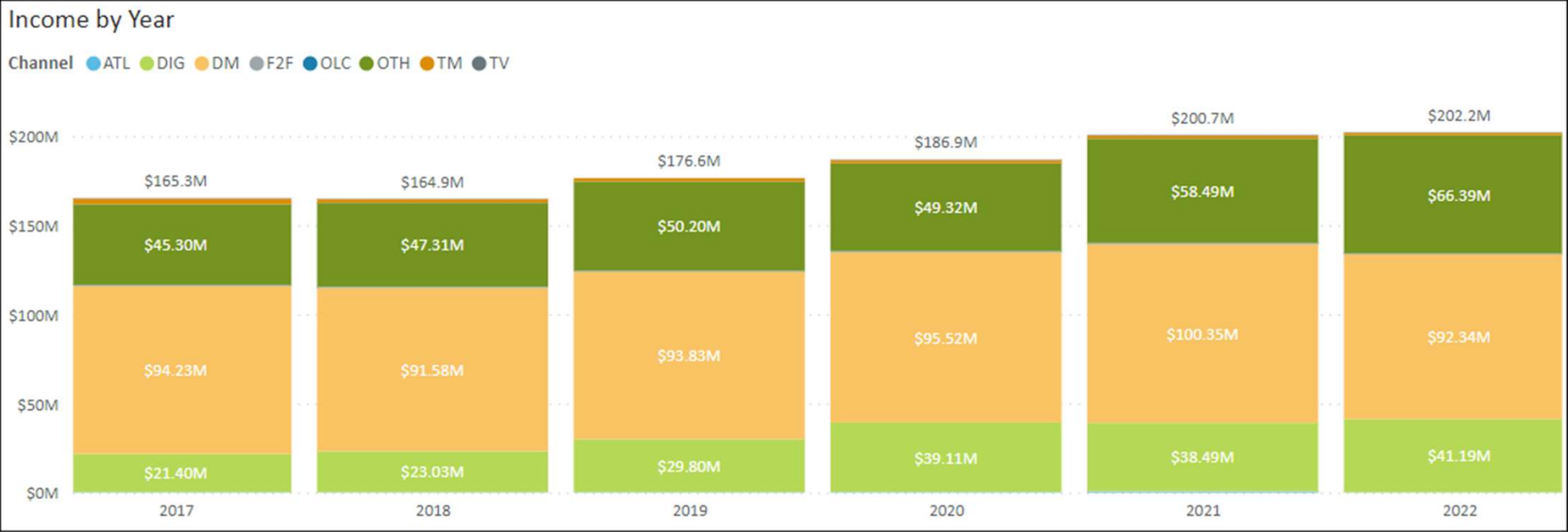


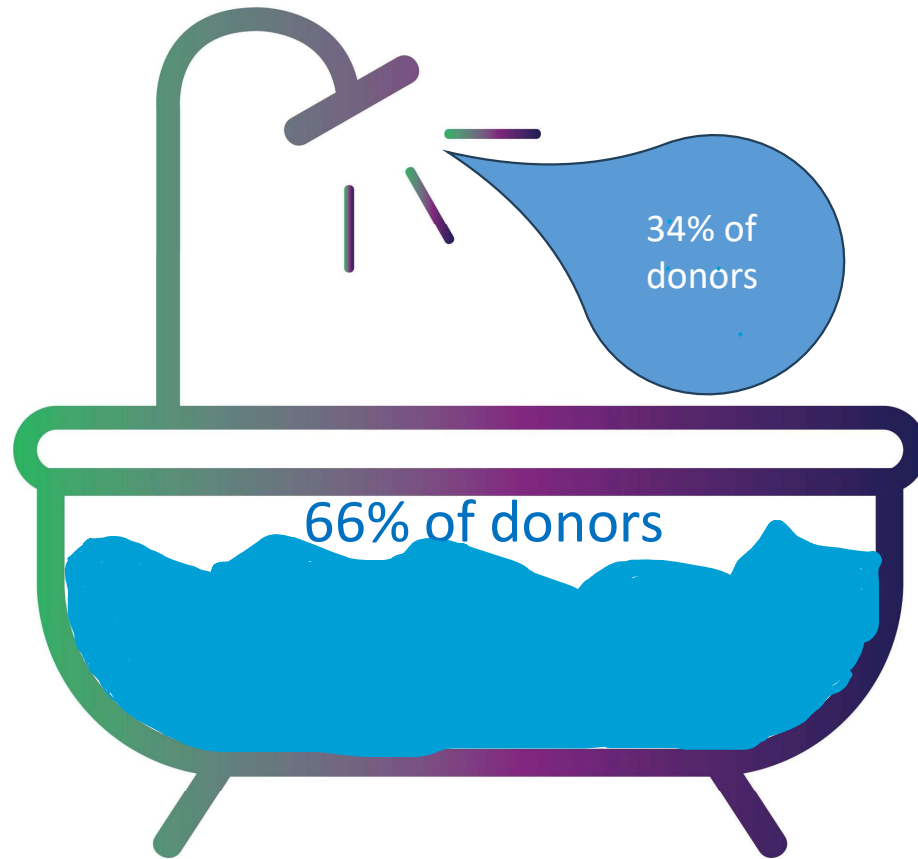
# Single Giving growth driven by retained donors

Income by Year

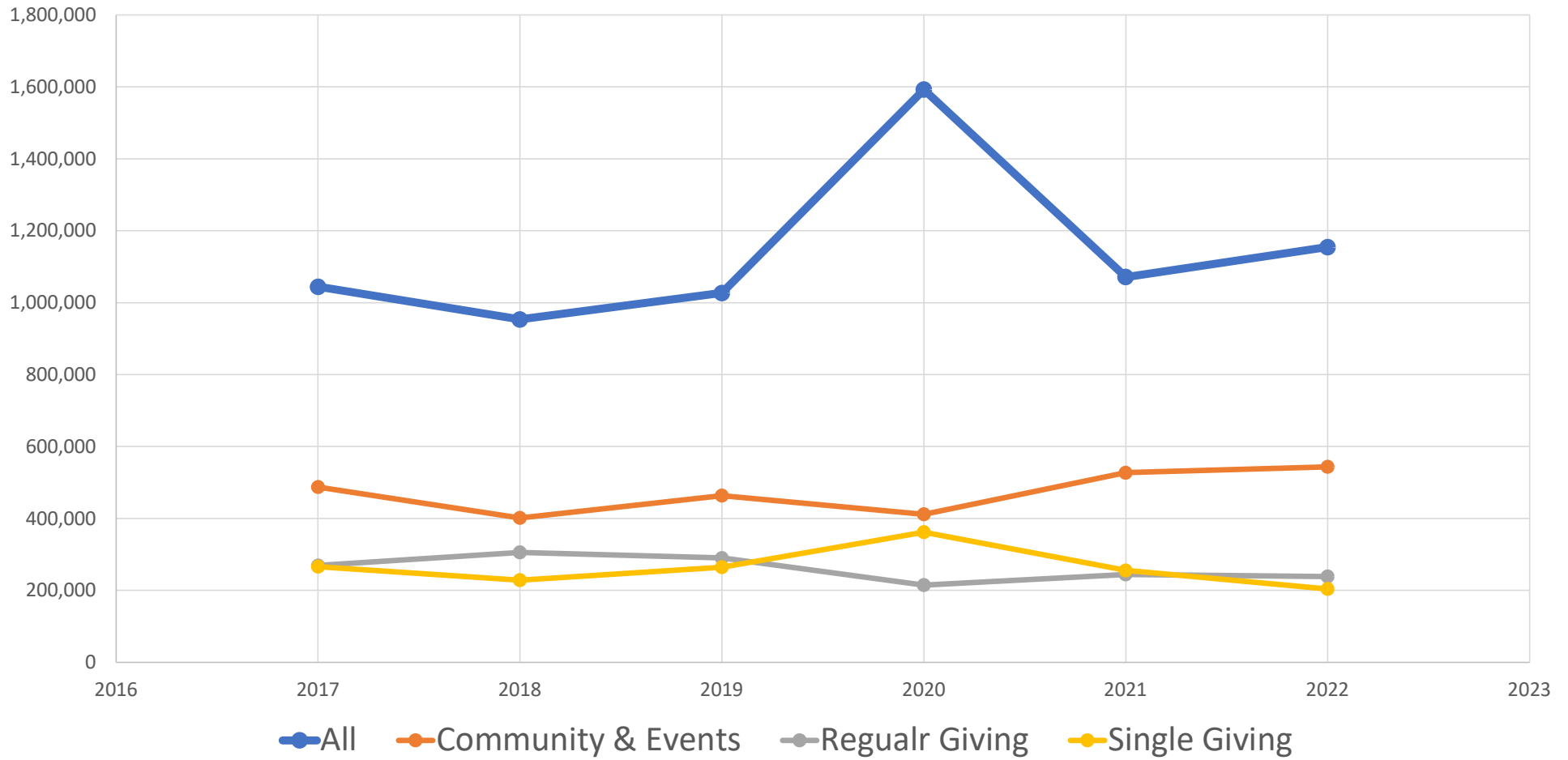


# Direct mail still dominates Single Giving income generation





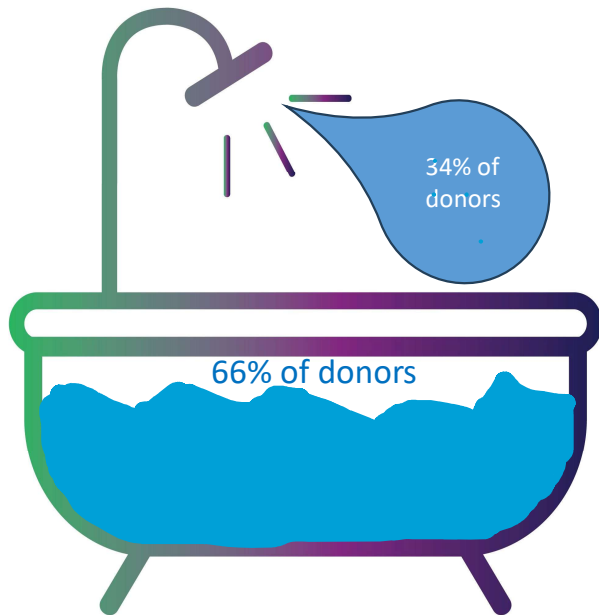
Individual Giving Acquisition Volumes





Year 1 Income per New Donor



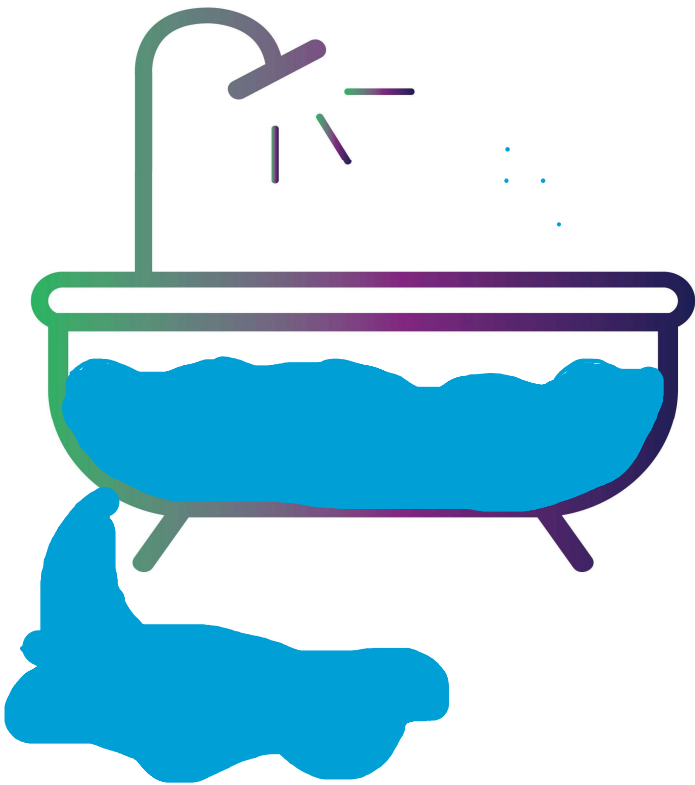


Retention	New donors First 12 Month	3-year donors	5-year donors
Single Givers	21%	55%	79%

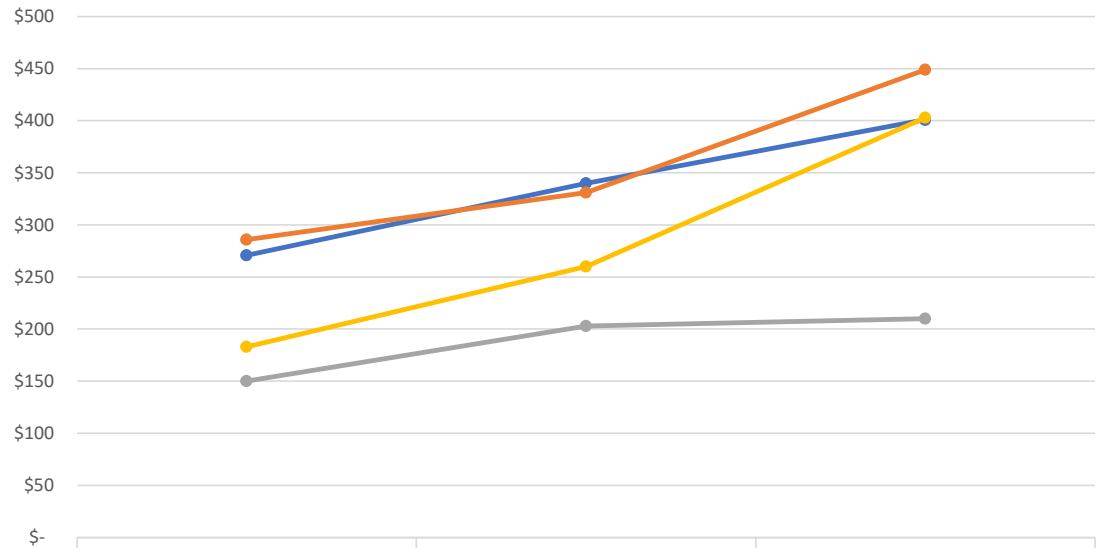
# Channel of recruitment is heavily influencing retention and contactability

First Gift Channel	2019 Retention	2020 Retention	2021 Retention	2022 Retention
Digital	34.0%	30.4%	23.4%	32.8%
Direct Mail	52.2%	54.0%	51.8%	52.4%

2022 Recruits First Gift Channel	Email Contactability	Mail Contactability	Phone Contactability
Digital	87%	76%	69%
Direct Mail	25%	91%	32%



Average Annual Value

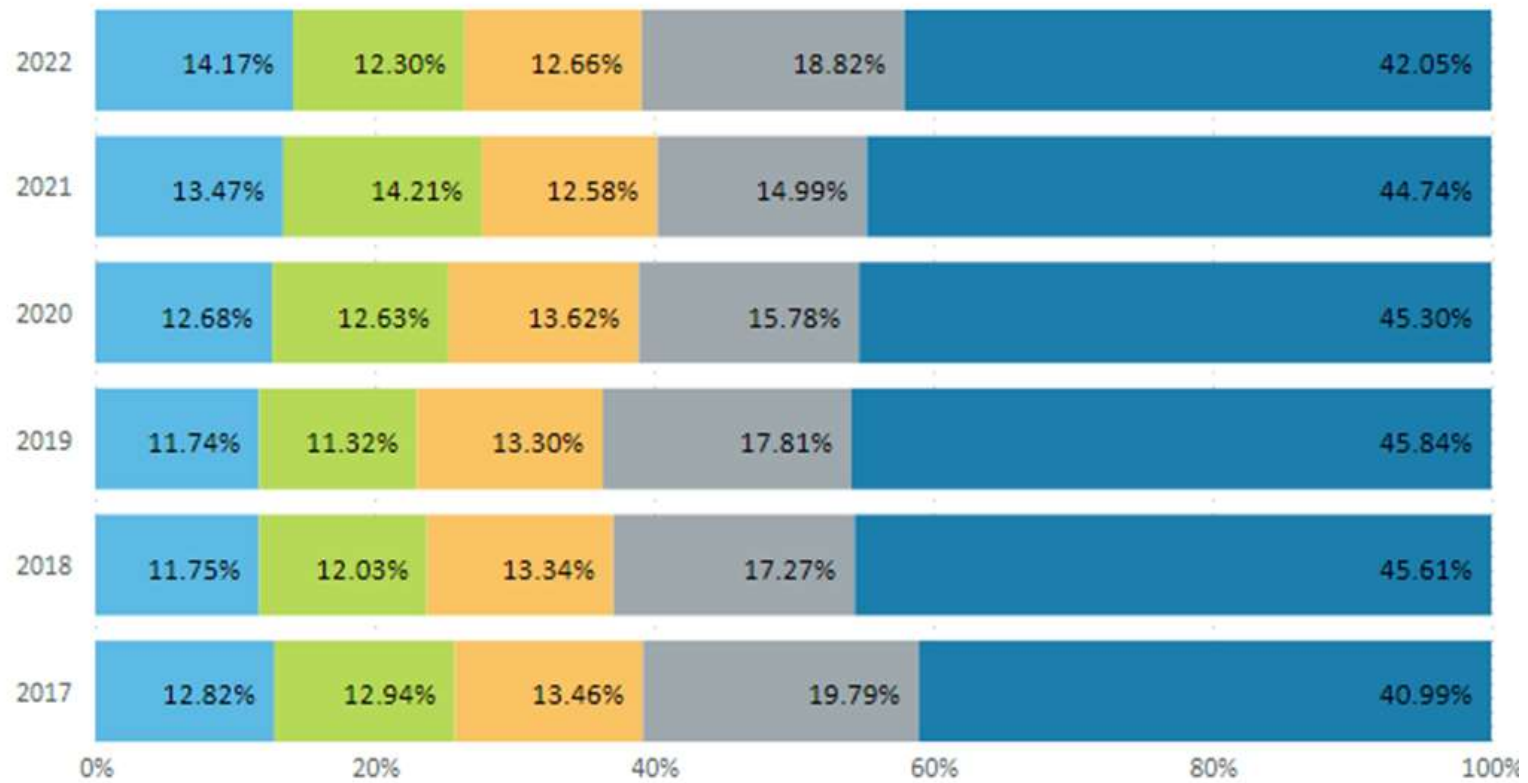


	2022 Year 1 Income	Average annual value 1 to 5 year donors	Average value 6 - 10 year donors
RG F2F	\$271	\$340	\$401
RG DIG	\$286	\$331	\$449
SG DM	\$150	\$203	\$210
SG DIG	\$183	\$260	\$403

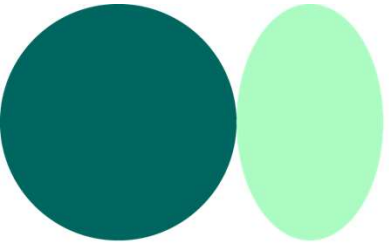
# Long-term donors are the best

Percentage of Single Giving income contributed by years giving

Last5Years ● 1 ● 2 ● 3 ● 4 ● 5



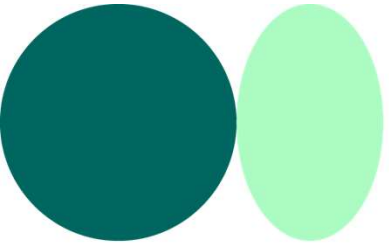
Who is great at retention & why?



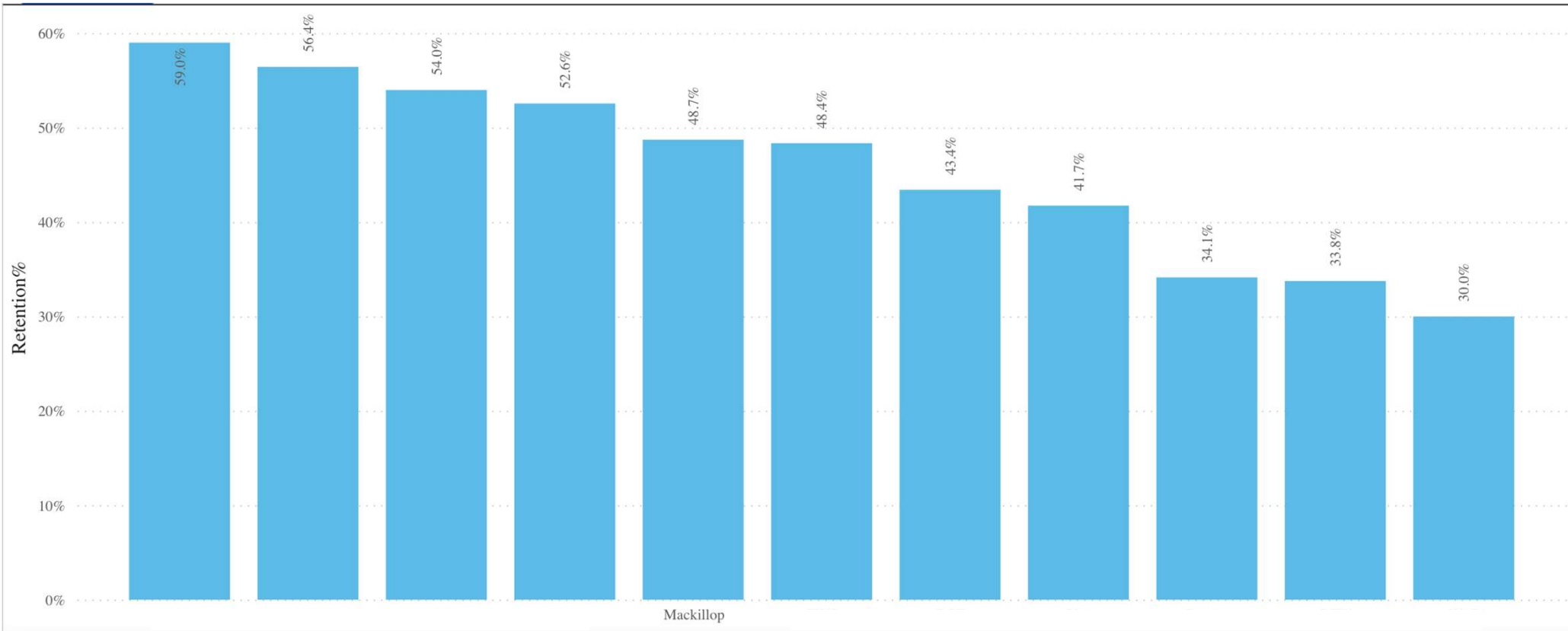
**MacKillop  
Family  
Services**



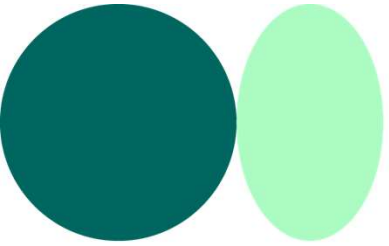
CONFERENCE



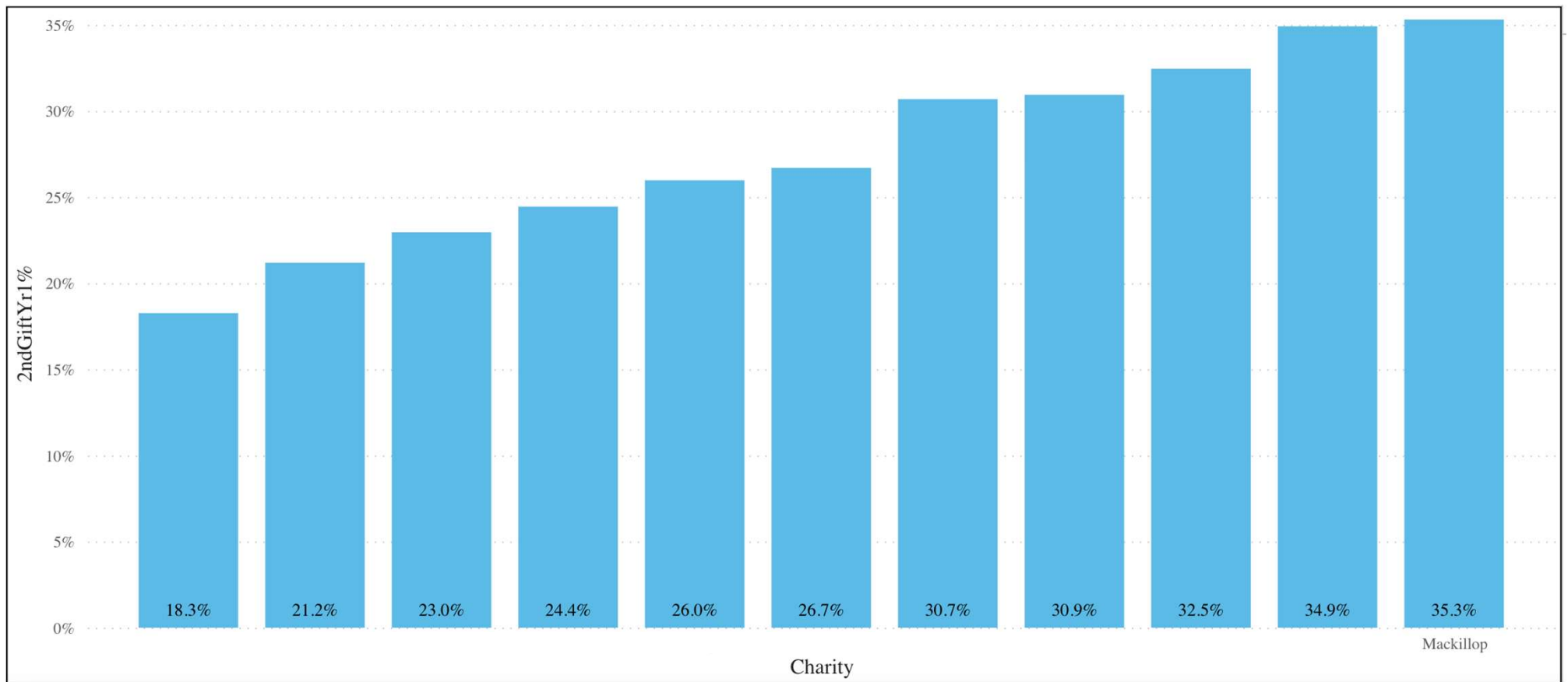
# Single Giver Retention: 49%

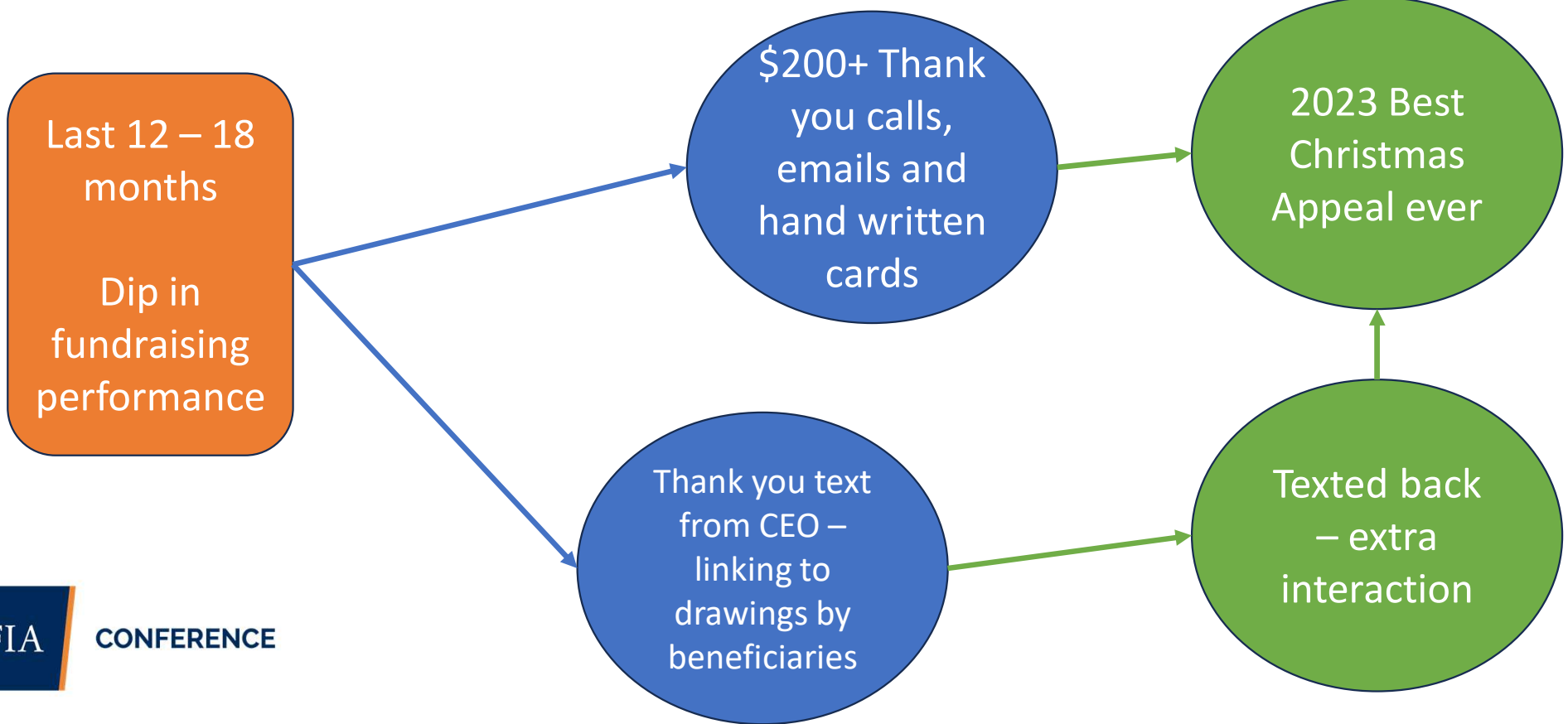
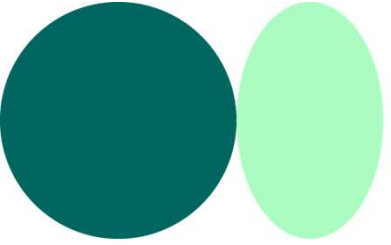


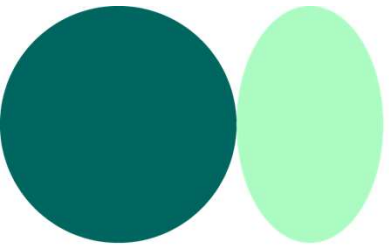




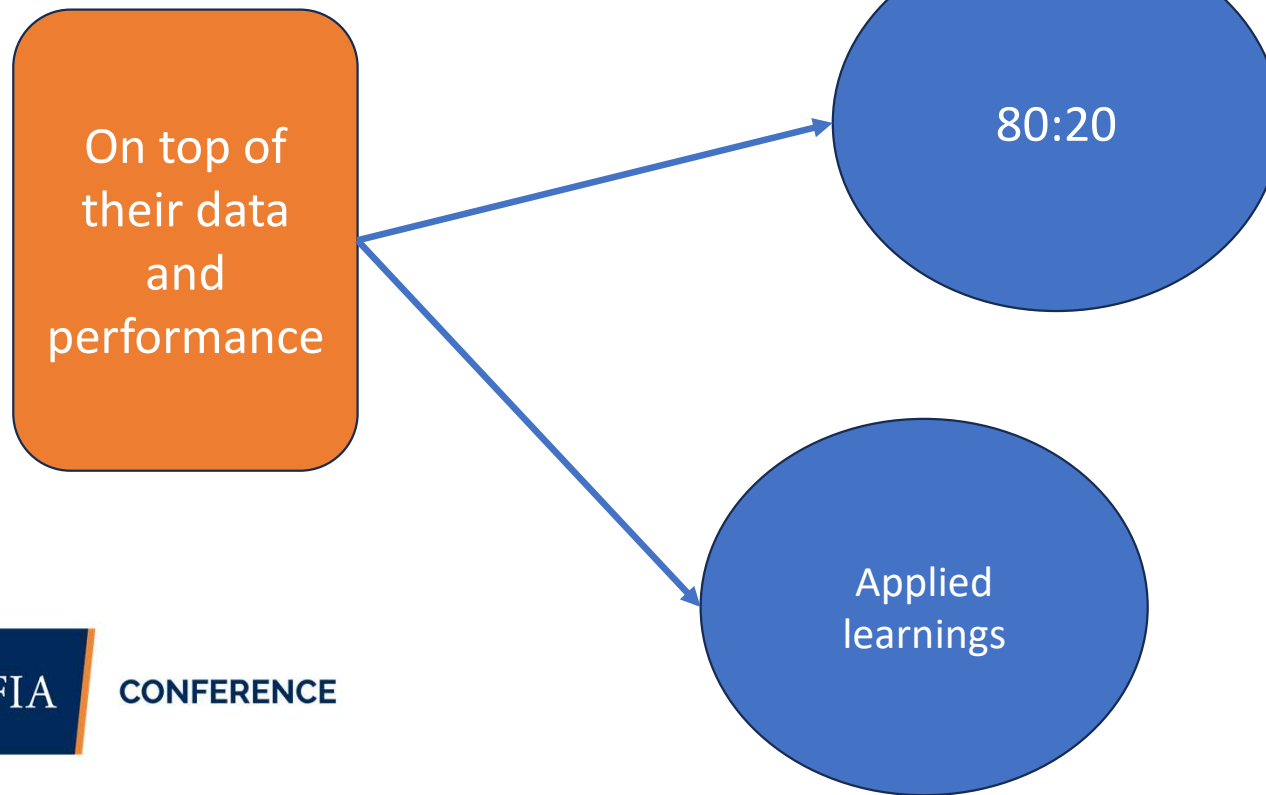
# Second gift rate: 35%

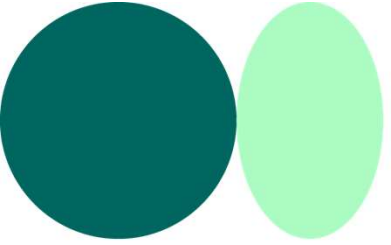






# Measure & Track





# Measure, Track & Apply

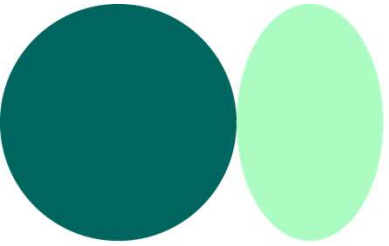


On top of their data and performance

80:20

Applied learnings

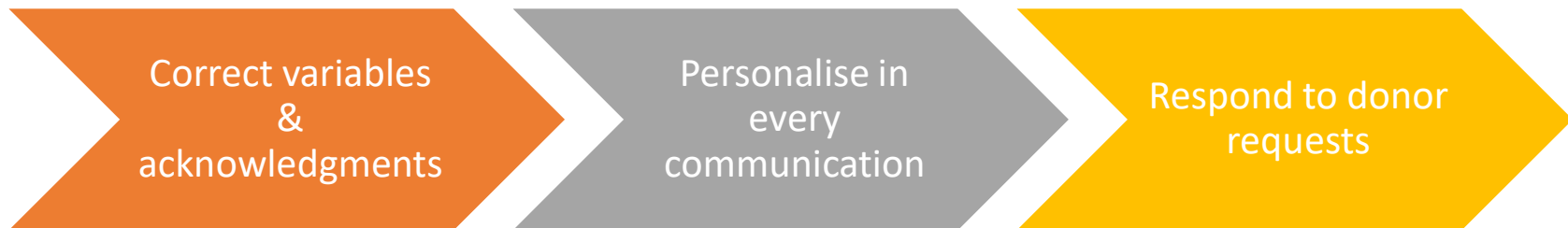
- Listen
- Track opt outs
- Track click throughs
- Track RTS
- Monitor retention



# Meticulous

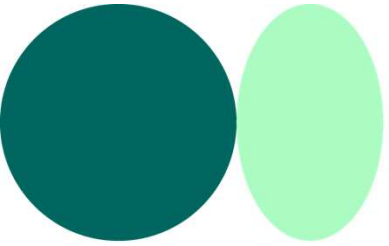


- Consistent segmentation – not chopping and changing
- Tagging every engagement – outbound & inbound
- Meticulous recording communications preferences



FIA

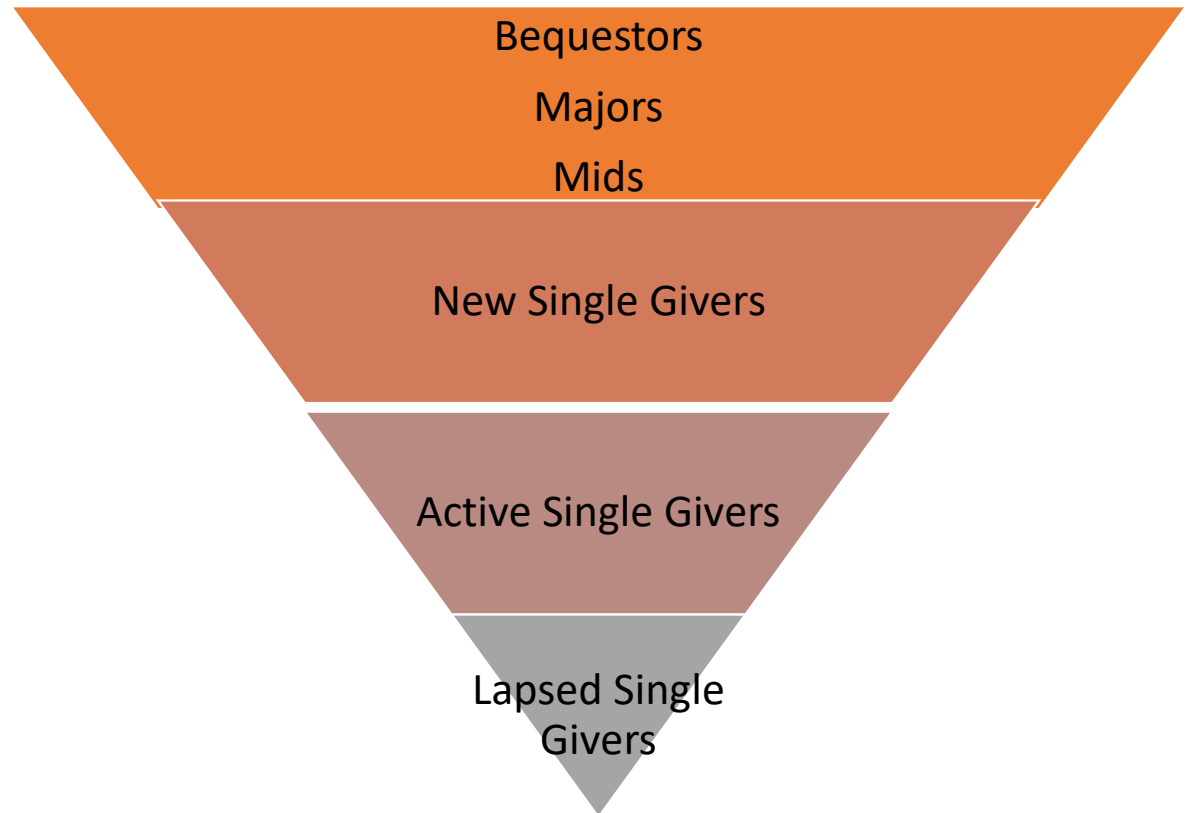
CONFERENCE

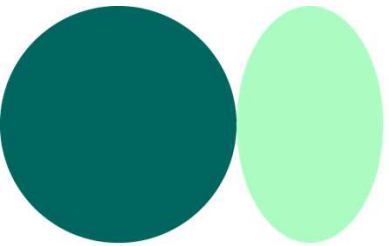


# Functional Team Services the Segments



6 team  
members





# Measure & Track

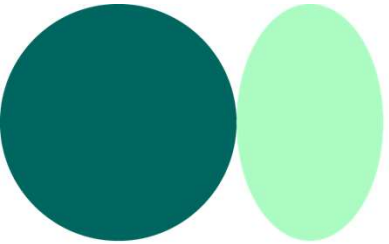


## Key Metrics

- Response Rates
- Second gift rates
- Donor feedback
- Opt-outs
- Email open & click through
- Return to Senders

## Techniques

- New donor journey
- Existing donor journey
- Calls
- Cards & notes



## Meaghan's Top Tips

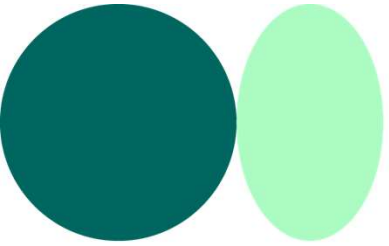


Tip 1: 'If you ask you have to thank'

Tip 2: Create strong connections through Hyper-personalisation. Treat your supporters like they're a friend.

Tip 3: Record EVERYTHING

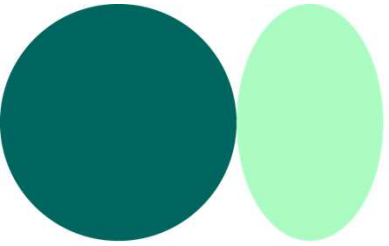




The **Fred Hollows**  
Foundation



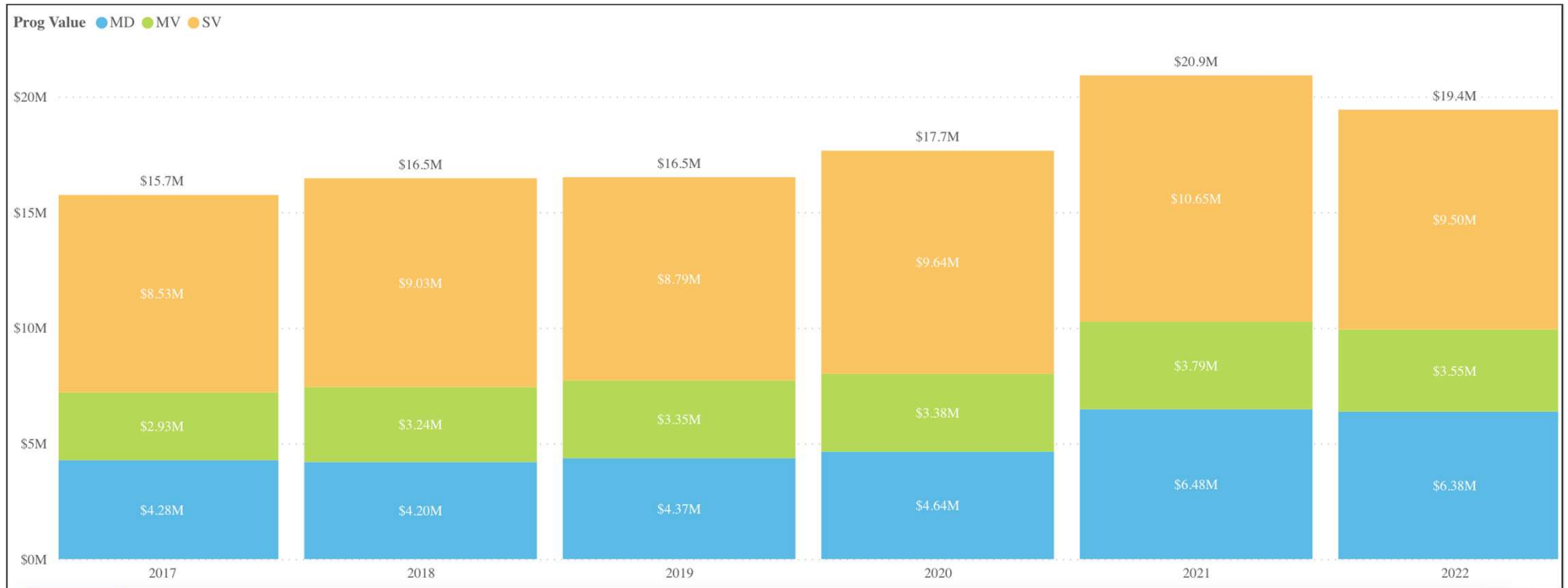
CONFERENCE

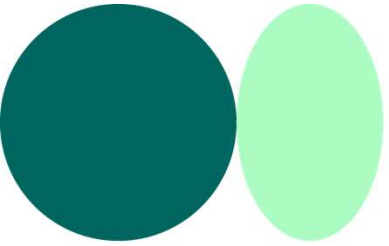


# Single Giver Income



The Fred Hollows Foundation

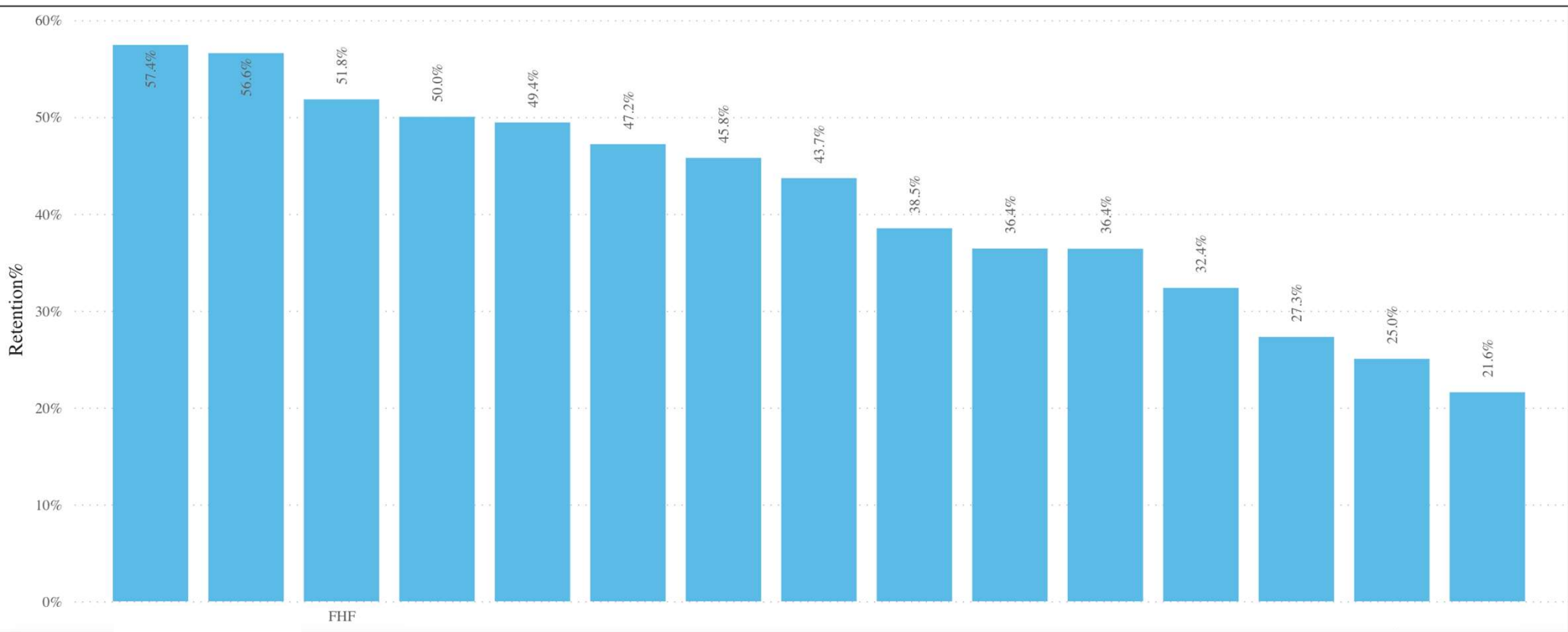


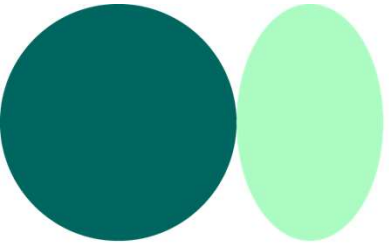


# Single Giver Retention: 52%



The Fred Hollows Foundation

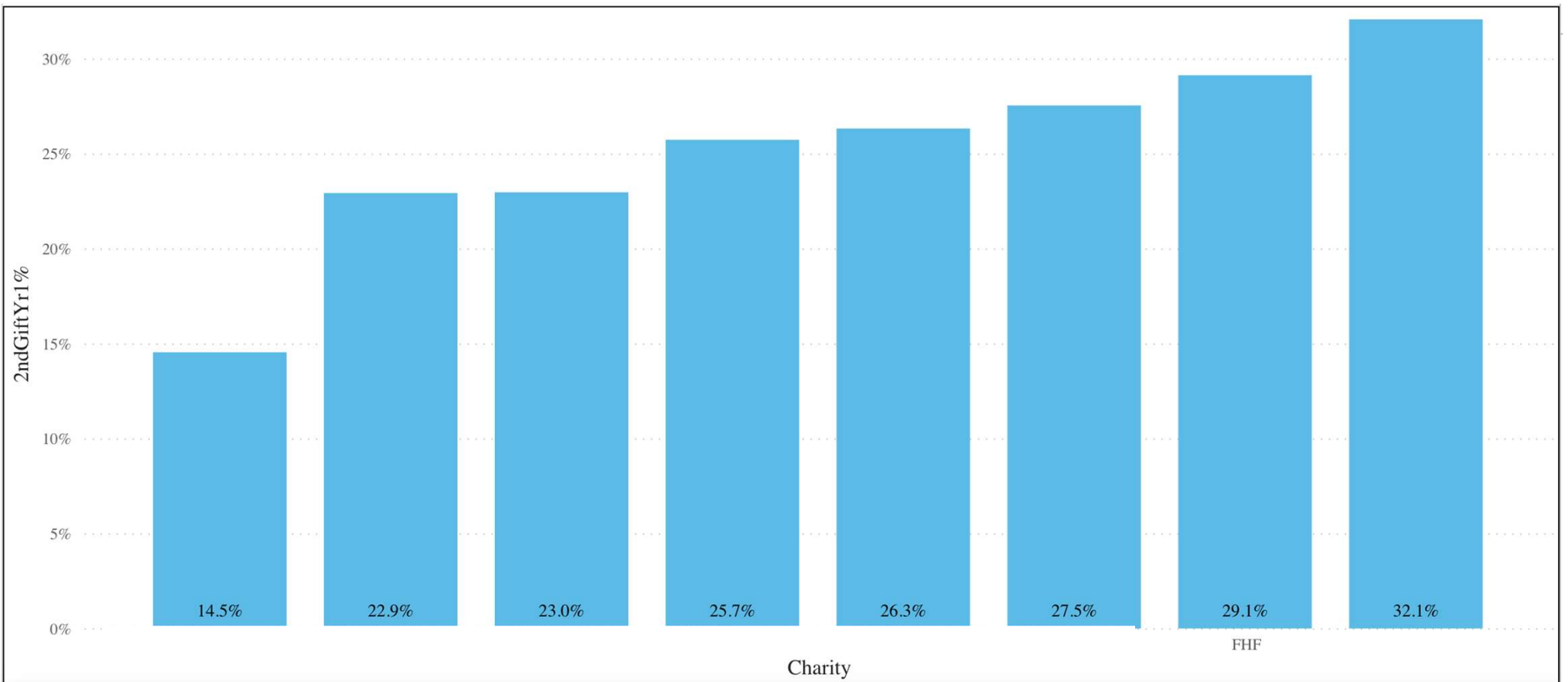


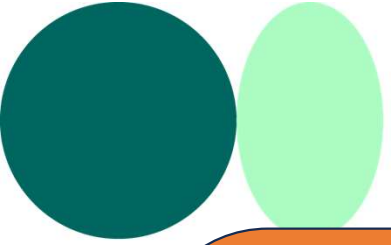


# Second Gift Rate: 29%



The Fred Hollows Foundation



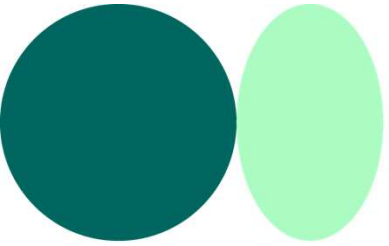


Have focused efforts on Mids  
What about the top of the file behind them?  
2021 new recruits who've not given again  
Opt outs & channels  
Cheque removal

Handwritten notes

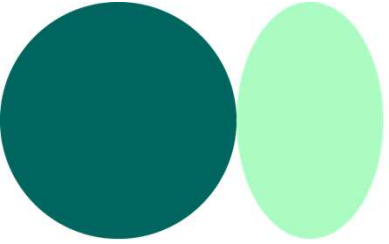
Proactively identifying

How to match personalisation levels and experience across channels



# Cheque removal





The **Fred Hollows**  
Foundation



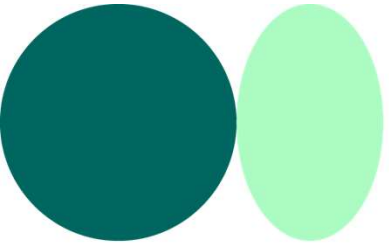
Laser sharp focus on who & how

Put the 20% first

Marry mass and automated with high  
touch and personal

FIA

CONFERENCE



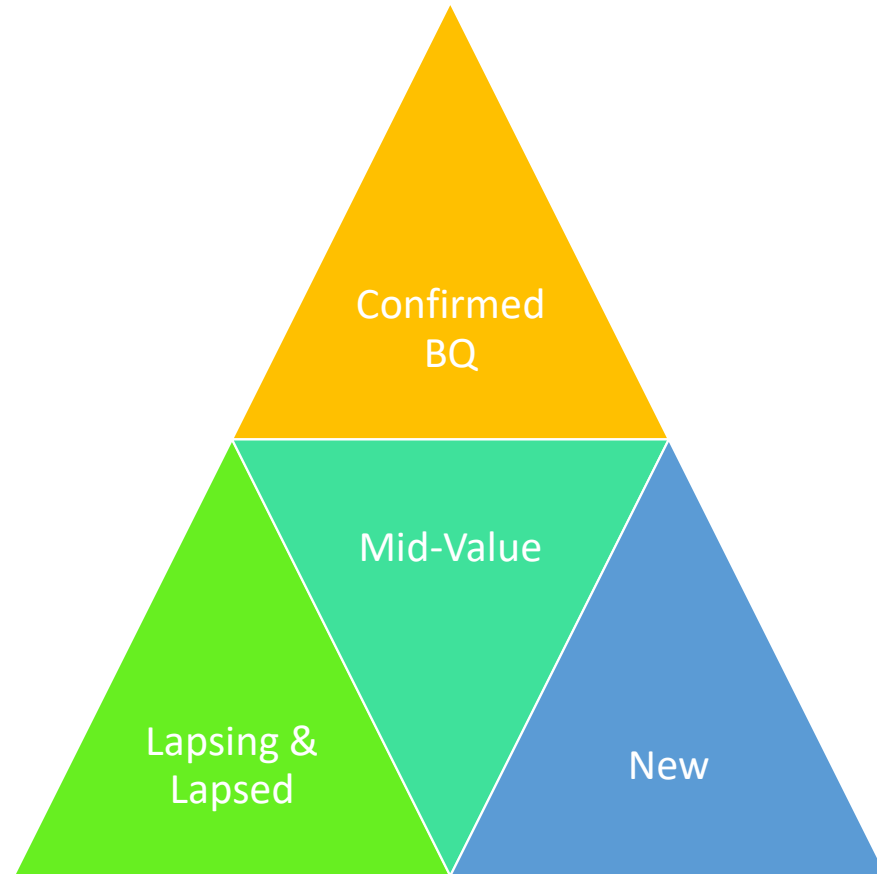
# RFV – Lifecycle overlays



The Fred Hollows Foundation

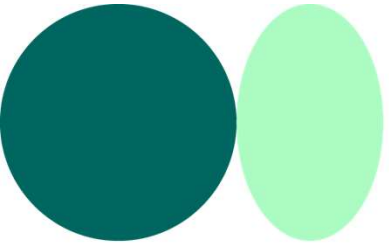


4 team members



CONFERENCE

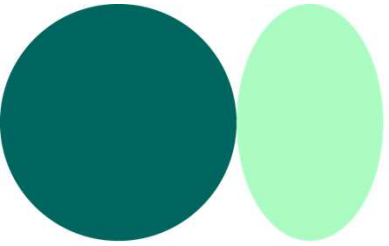




# Effective & Efficient Reporting

## Key Metrics

- Overall active supporter base numbers
- Second gift rates
- Retention rates by frequency and value over past 5 years
- Movement between gift bands (higher or lower or the same)

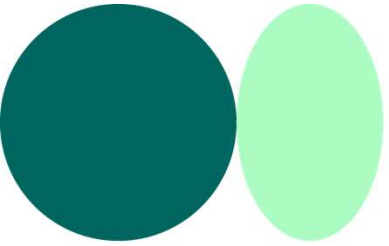


# Techniques: Best Practice & Test and Learn

- New donor welcome journey
- Impact driven receipting
- Personalisation
  - Recognise tenure
  - Variable paragraphs
- Focus on those most likely
- 80:20 events



CONFERENCE



## Roz's Top Tips



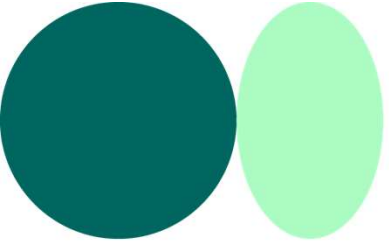
The Fred Hollows  
Foundation

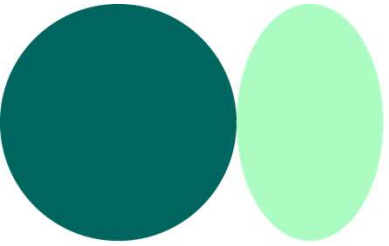


Tip 1: Put the donor first

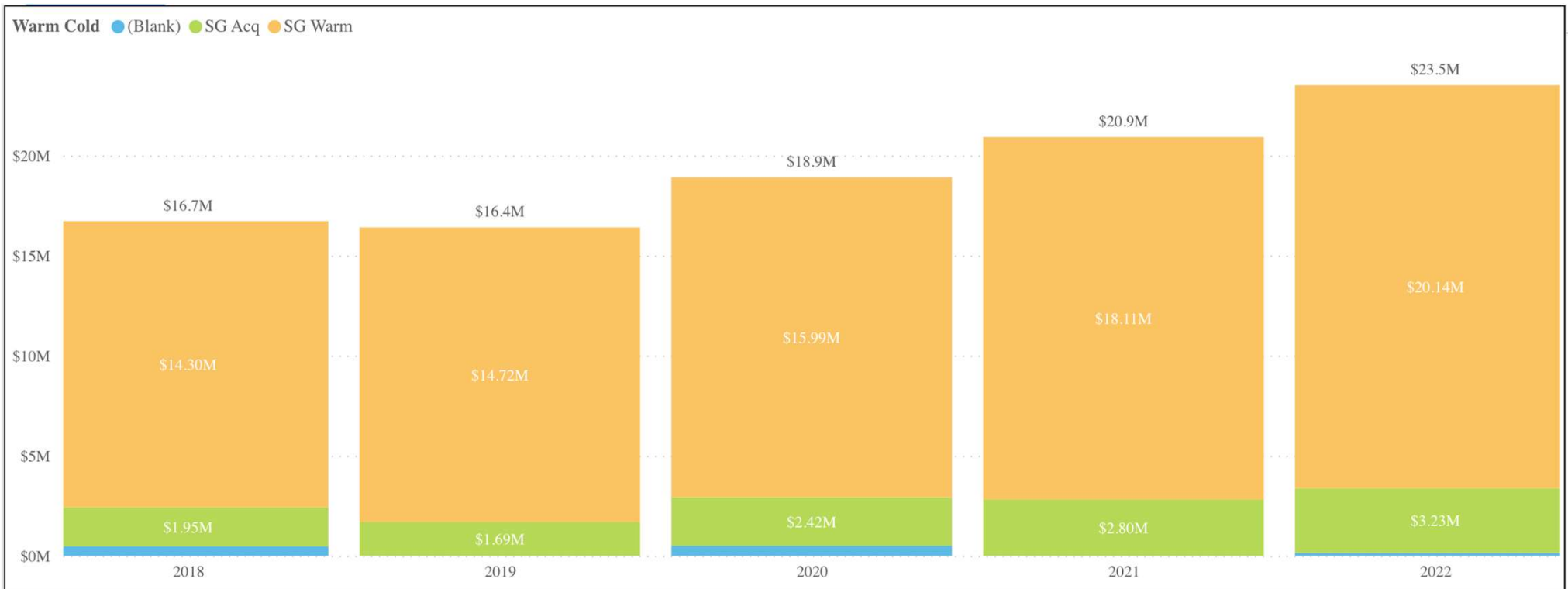
Tip 2: Thank

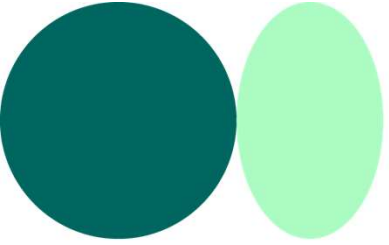
Tip 3: Demonstrate impact



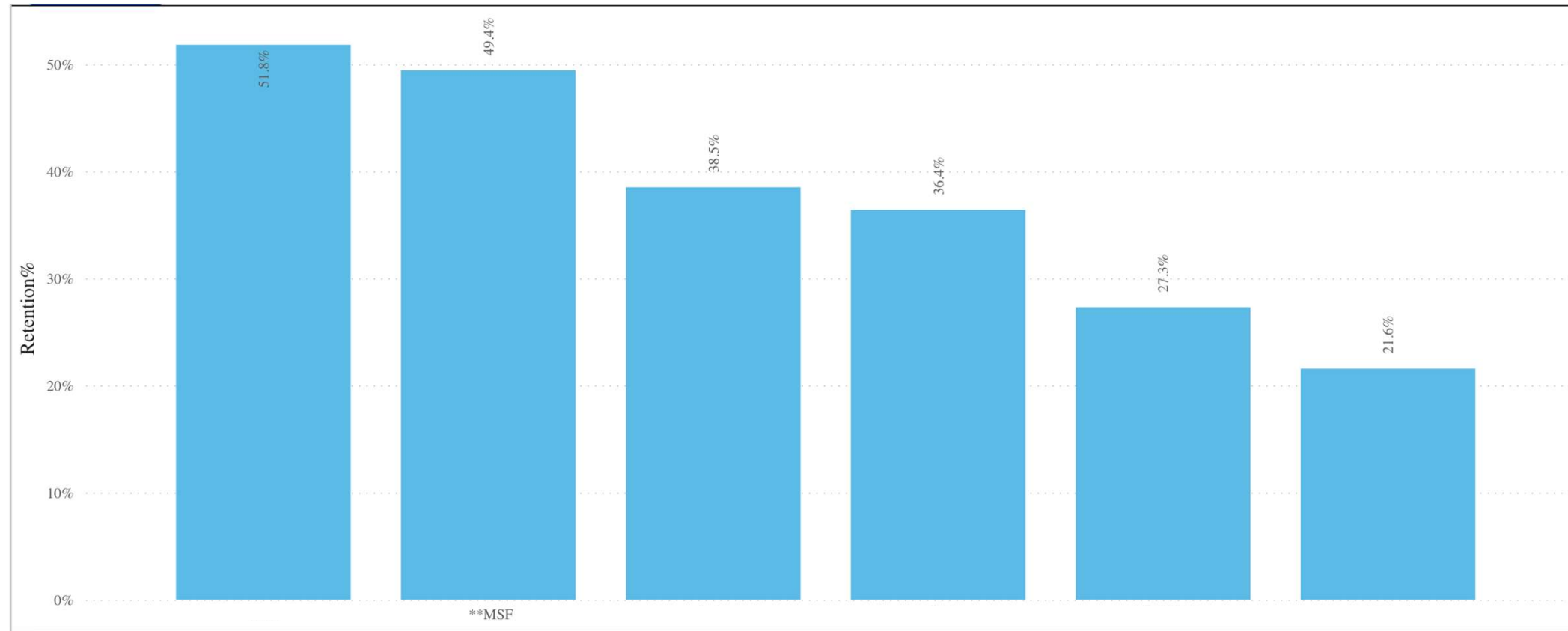


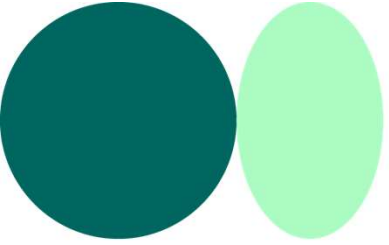
# Single Giving Income





# Single Giving Retention: 49%

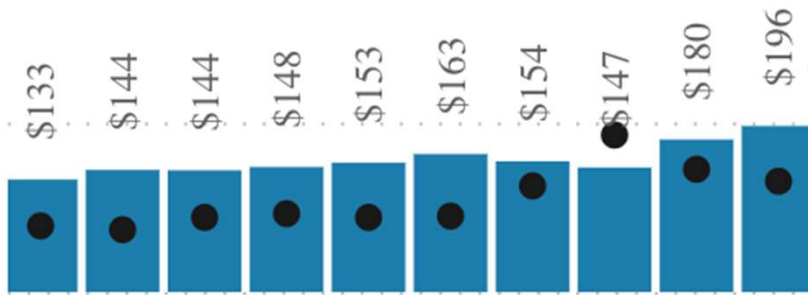




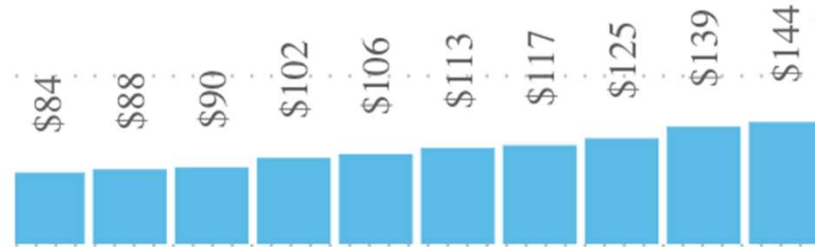
# Average Gift Growth

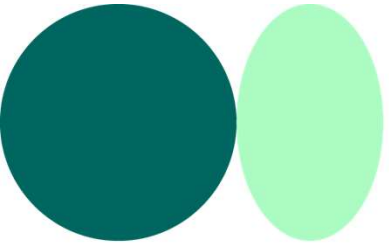


DIG



DM



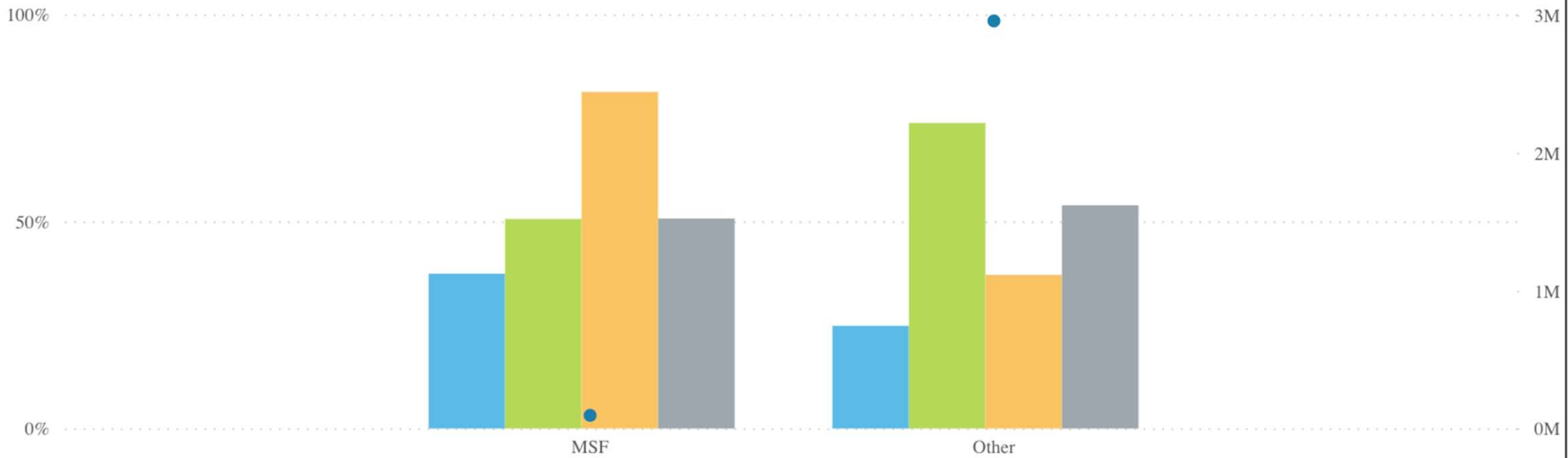


# Contactability

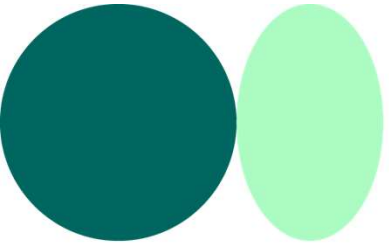


Contactability Me v All

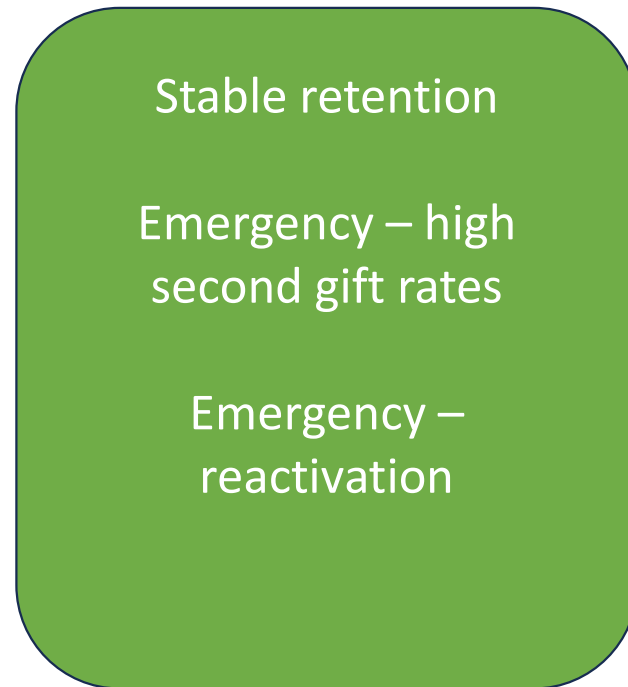
● SMSable % ● Mailable % ● eMailable % ● Phoneable % ● Recruits



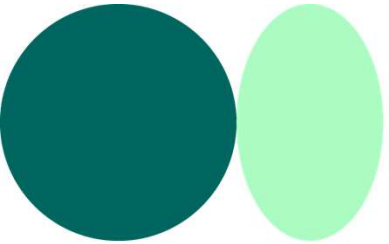




MSF



CONFERENCE

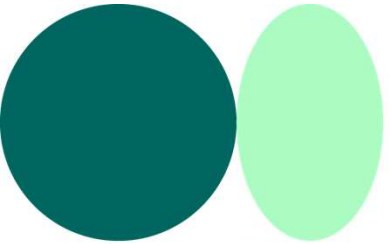


# Data Hygiene & Personalisa



- Data hygiene management CRITICAL
- Clear and consistent business rules for data usage
- Strong internal review process
- Match the communication to the donor
- Survey to increase data capture and understanding

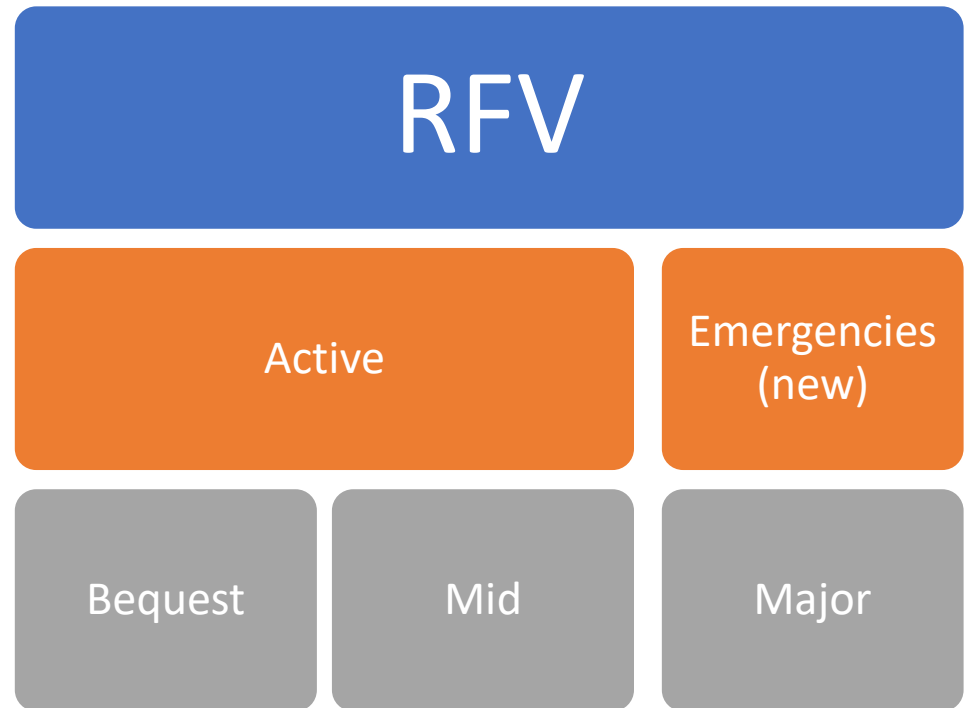


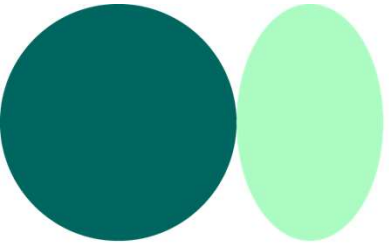


# Service & Benchmark the Segments



4 team  
members



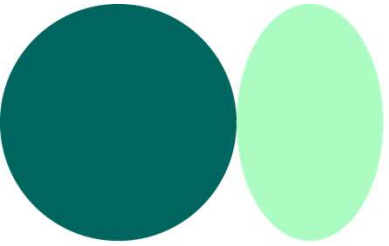


# Internal & External for Insight



## Key Metrics

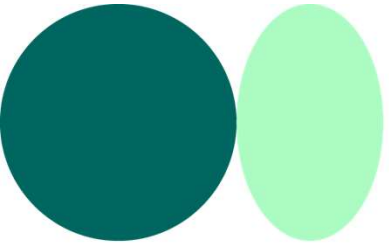
- Year on Year appeal tracking
  - Income
  - ROI
  - Average gift
  - Track the volume of appeals they send out to each audience
- Gift volumes & Response Rates
- Second gift rates



## Techniques: Personalised, impact driven with warm & fuzzy



- Thank in a timely manner
- 'The Pulse' (their newsletter) four times a year
- Monthly e-newsletter
- 'Thank you' postcards
- EOFY receipts, which also includes a report back and summary of all the things the donors have helped accomplish
- Thank you calling during appeal periods
- A big focus this year is personal relationships and personalisation



## Holly's Top Tips

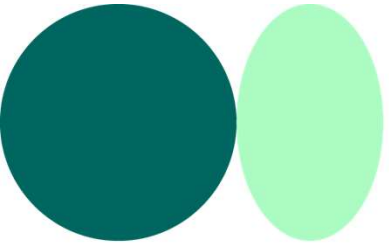


Tip 1: Data hygiene

Tip 2: Be topical

Tip 3: Test & value failure

Metrics



## What to Measure?

- Second gift rate (12 months)
- Second gift rate (24 months)
- Long-term donor retention (5-year)
- New donor retention (2-year)
- Gifts per donor
- Value per new donor
- Value per retained donor

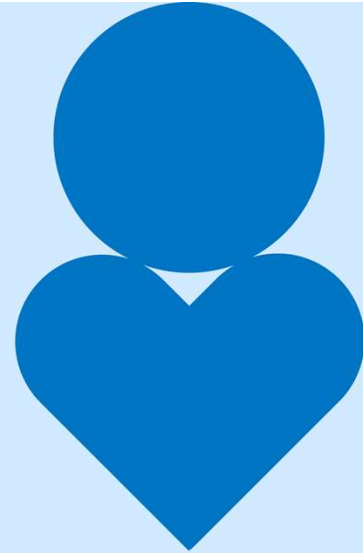
- Average gifts
- Upgrade/downgrade/same giving level
- Mid Value migration
- Year on year tracking
  - Income
  - Number of gifts / gift retention
  - Number of donors / donor retention



**JOIN  
US  
IN  
2024**



**FIA  
Conference**  
2024



# Thank you

[Fi.mcphee@benchmarkingproject.org](mailto:Fi.mcphee@benchmarkingproject.org)  
[www.benchamarkingproject.org](http://www.benchamarkingproject.org)



Individual Giving Track  
Sponsored By:

**Robejohn**