



**Center for  
Nonprofits & Philanthropy**  
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

# Donors are giving, so how do we keep them?

A discussion of Q2 giving data and donor retention strategies

## Adapting to Turbulent Times Series

November 12, 2020

**Angela Seaworth, Ph.D., ACFRE**  
**Nicole Gabler, '17 – Donor Relations Advisor, Texas Children's Hospital**  
**Codi Smith, '18 - Development Associate at Rebuilding Together**

# Center for Nonprofits and Philanthropy



**Our Mission: The CNP supports a vibrant nonprofit and philanthropic sector in Texas**

Founded in 2017, the Center operates with the belief that that nonprofits are instrumental in creating opportunities for all. This happens through capable leadership, excellent governance, and engagement of stakeholders. We also recommit to the principles of *public service and democracy* and the value of *diversity of thought and expression* that have helped The Bush School since its inception.



## **Educational Opportunities**

- Master of Public Service & Administration
- Executive Master of Public Service & Administration
- Certificate in Nonprofit Management
- Continuing & Professional Education Courses

## **Our Values**

**Nonprofits**  
**Opportunity for all**  
**Board**  
governance  
Leadership



**Center for  
Nonprofits & Philanthropy**  
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

# Welcome Our Speakers



## **Nicole Gabler, '17 – Donor Relations Advisor, Texas Children's Hospital**

Nicole is a foundational member of Texas Children's first dedicated Donor Relations program and she guides the Office of Philanthropy in strategic stewardship and retention campaigns. Nicole transformed an underperforming, reactive donor relations program into an intentional, proactive structure that has realized a 200% increase in stewardship touches over two years. Nicole was recently named a 40 Under 40 Honoree by the Association of Healthcare Philanthropy.



## **Codi Smith, '18 - Development Associate at Rebuilding Together**

Codi is an individual giving fundraising strategist that highlights stewardship and donor segmentation. Her work involves gift acknowledgements, donor reports, and industry research. She formerly worked as the Associate Director of Stewardship at the LSU Foundation and served as a Donor Engagement Intern at the Texas A&M Foundation.



# Giving During COVID



How do we track giving?

- Giving USA – annual, after year end
- Fundraising Effectiveness Project (FEP) – quarterly, live data

How can we use this giving data?

What trends are we seeing in giving?





# Quarterly Fundraising Report™

Year-to-Date Nonprofit Sector Trends 01/01/2020–06/30/2020



## Highlights

Giving from the first quarter of 2020 was 6% behind first quarter giving in 2019. Charitable giving has increased over the first half of 2020, compared to the first half of 2019. Notably, the number of gifts of less than \$250 increased by 19.2% over 2019.

- Donors showed up in the second quarter with a 12-point swing in donations.
- More donors gave to the same organization to which they had previously given.
- Donations and number of donors are the highest in 5 years.



**Donors**  
(Year-to-date) 56%

↑ **+7.2%**  
YTD Change



**Donations**  
(Year-to-date) 47.3%

↑ **+7.5%**  
YTD Change



**Donor Retention<sup>1</sup>**  
(Year-to-date) 27.1%

↑ **+1.8%**  
YTD Change

Donation and retention metrics report on year-to-date (YTD) performance compared against the prior year total based on a panel\* of organizations selected from the Growth in Giving Database of 204 million transactions from more than 20,000 organizations and \$80 billion in donations since 2005.

# Donors

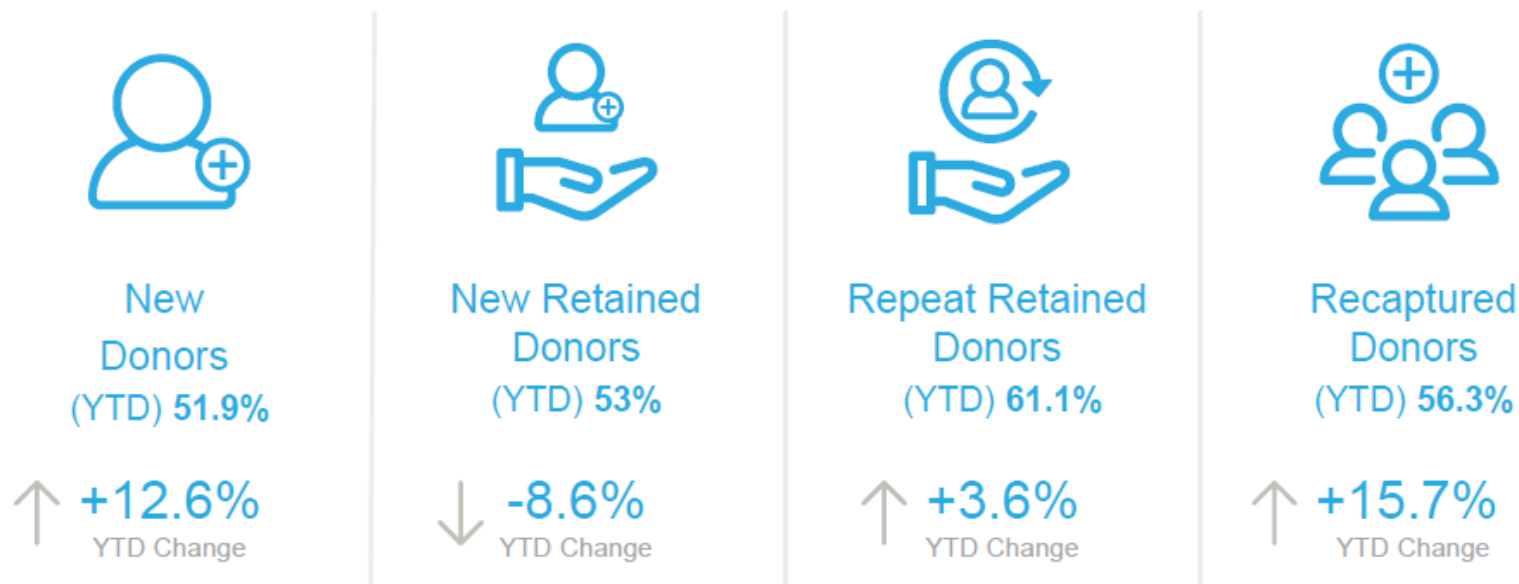
Year-to-Date Nonprofit Sector Trends 01/01/2020–06/30/2020



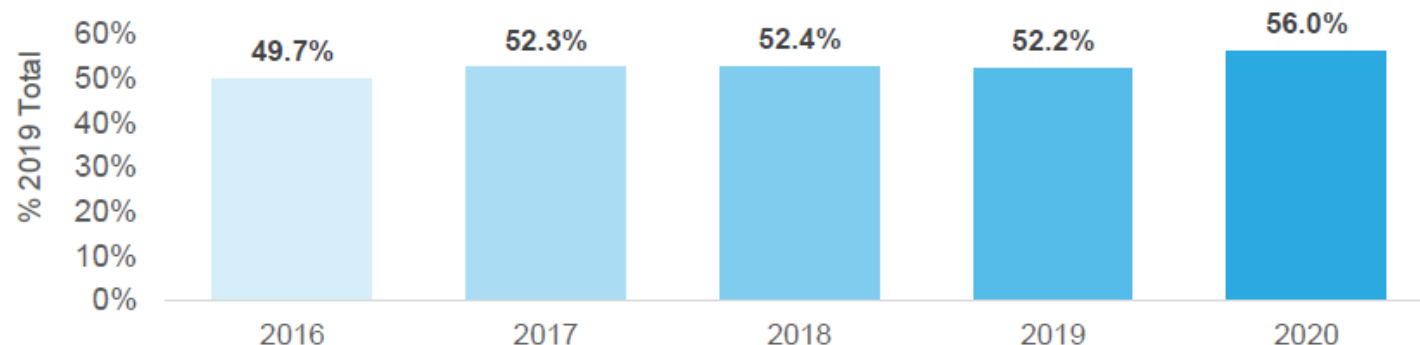
## Highlights

The number of new and recaptured donors increased sharply in the second quarter, adding to the pool of active supporters for 2020.

The latest data shows that despite a sharp decline in the number of new 2019 donors retained in 2020, the number of repeat donors retained or recaptured from previous years increased.



Second Quarter Donors YTD (As % 2019 Total)



Year-to-date response and retention metrics indicate how new single gift, existing, and lapsed donors are responding.

# Retention

Year-to-Date Nonprofit Sector Trends 01/01/2020–06/30/2020

## Highlights

The increase in the number of repeat donors retained offset the decline in new donors retained for an overall increase of 1.8% in donor retention.

With fluctuations in the numbers of donors these retention metrics are illustrative of how effective the sector is at engaging donors.



Repeat Donor  
Retention Rate  
(YTD) 37.5%

↑ +2.5%  
YTD Change



New Donors  
Retention Rate  
(YTD) 11.5%

↓ -6.0%  
YTD Change

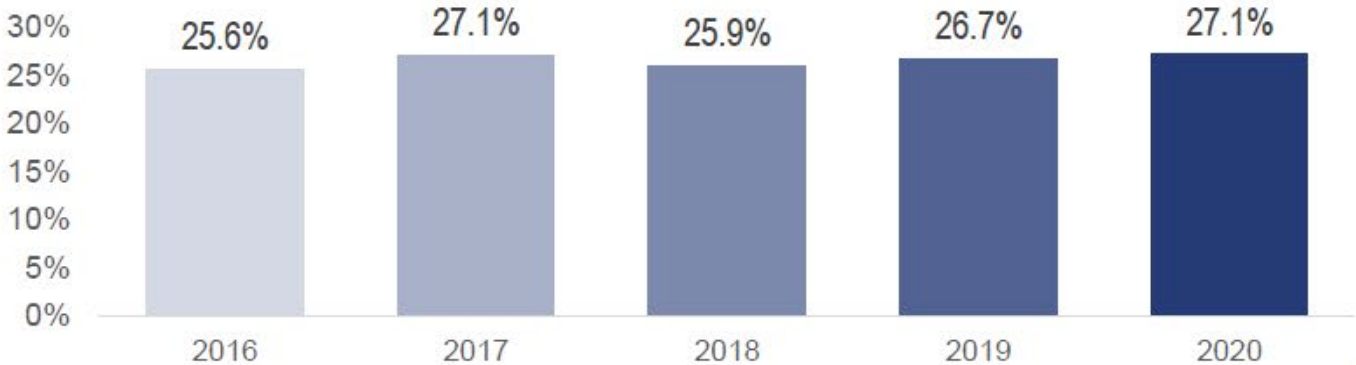


Recapture Rate  
(YTD) 2.1%

↓ -2.1%  
YTD Change

Year-to-date retention metrics indicate what percentage of existing and lapsed donors from previous years are giving again.

Overall Donor Retention YTD



# Donations

Year-to-Date Nonprofit Sector Trends 01/01/2020–06/30/2020

## Highlights

Leading the charge, general donors giving gifts less than \$250 have come out in a huge way during the pandemic. While gains are apparent across all levels of giving, the greatest increase in the number of gifts is seen among donors giving smaller gifts.



General Donor  
(Under \$250)  
(YTD) 4.1%

↑ +19.2%  
YTD Change



Mid-Level Donor  
(\$250–\$999)  
(YTD) 3.3%

↑ +8.1%  
YTD Change

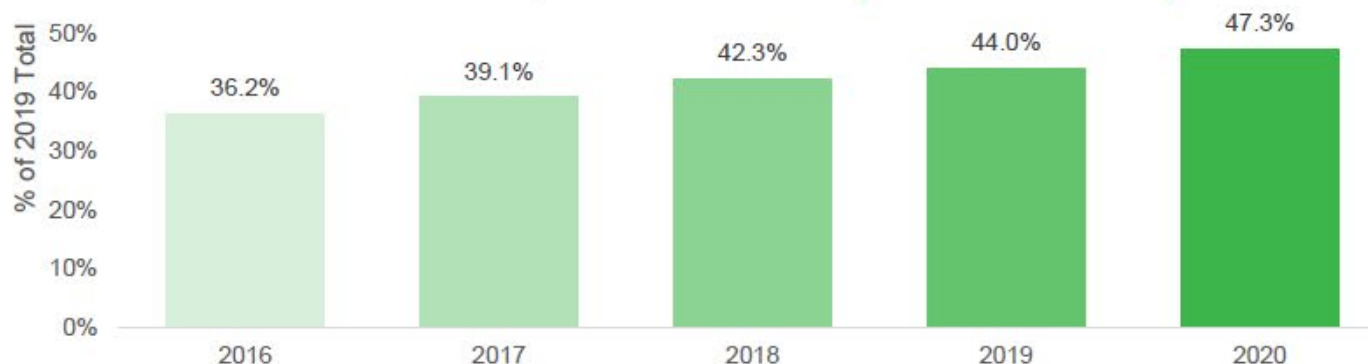


Major Donor  
(\$1,000+)  
(YTD) 39.9%

↑ +6.4%  
YTD Change

Year-to-date donor level metrics indicate how the number of gifts from all donor levels has changed from the previous year.

## Second Quarter Donations (As % 2019 Total)





# What Is Donor Relations



According to the Association of Donor Relations Professionals\*

“Donor relations is the comprehensive effort of any nonprofit that seeks philanthropic support to ensure that donors experience high-quality interactions with the organization that foster long-term engagement and investment.”

- All interactions with donors related to philanthropy: gift administration, acknowledgement, recognition, and reporting
- Principles of maintaining positive and engaging relationships with donors

\* ADRP offering scholarships for memberships this year



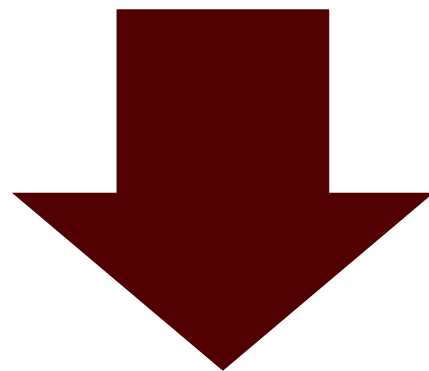
**Center for  
Nonprofits & Philanthropy**  
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

# Important Distinction



Donor relations goals are to help all donors feel included, known, and appreciated.

This will vary by size and type of institution, but you can develop a meaningful stewardship plan to help retain donors.



Exclusivity



Inclusivity



# Best Practices Donor Relations



Segmentation - helps us tailor our cultivation and stewardship

- Giving level
- Affinity

At each stage, be sure to communicate with donors and most importantly LISTEN to them.

Cultivation – Invitations to be involved encourage them to come closer to the organization

Stewardship – The way the organization thanks donors are equivalent with the donor's investment



# Tools to Manage Donor Relations



## Stewardship Matrix

- increase efficiency
- ensure consistency
- saves time that can be used for personal visits and cultivation

CRM can be used to establish a stewardship plan

- calendar each touchpoint
- automate personalized messages
- automated reminders





# Sample Stewardship Plan



**Plan steps**

Outlines: General Stewardship Add steps from template

Select all Clear all + Insert step Edit details Delete

Priority	Objective	Actual d...	Locked	Start time	End time	Contact m...	Assigned to	Associated...	Template	Frequency
	Holiday Card	9/2/2019	<input type="checkbox"/>			Mailing			General St...	Annually
	Holiday Gift	9/2/2019	<input type="checkbox"/>			Mailing			General St...	Annually
	Birthday Card	9/2/2019	<input type="checkbox"/>			Mailing			General St...	Annually
	Custom Report	9/2/2019	<input type="checkbox"/>			Task/Other			General St...	Annually
	Unveiling of Plaque	9/2/2019	<input type="checkbox"/>			Task/Other			General St...	Single Occ...
			<input type="checkbox"/>							

Adjust target dates: Forward 1 Day(s) Adjust dates

Help Save Cancel



# Sample Stewardship Plan



**Stewardship - Stewardship plan for**

Manager:

Start date:  
9/2/2019

Total revenue:  
\$13,580.00

Plan start date:  
9/2/2019

Site:

Plan stewards:

Recent revenue:  
\$100.00 (6/26/2014)  
\$500.00 (7/6/2010)  
\$100.00 (11/12/2008)  
\$100.00 (6/7/2005)

Active constituencies:  
Recognized donor Prospect Event  
registrant Committee  
member Major  
donor Individual Principal Gift  
Prospect

Details

Benefits and Interests

Purposes

Recognition Programs

Stewards

Documentation

Manager History

**Narrative**

Due to it's not appropriate for us to actively solicit her. She is recognized as an Abercrombie Society member due to her family's connection and support of TCH. We do not know for sure if she has included TCH in her estate plans. She should receive annual updates on TCH on the assumption that we are included.

**Pending steps (1)** **More** ▼

Category	Objective	Target date	Start time	End time	Time zone
Task	Annual TCH stewardship u...	11/15/2019			
Step	Add documentation				

**Completed steps (0)** **More** ▼

Category	Objective	Actual date	Start time	End time	C
----------	-----------	-------------	------------	----------	---



# New Donor Strategies



Welcome to the donor family with a first-time donor packet  
(email + printed pieces both work depending on your donor database and how the donor )

- gift receipt
- thank you note
- impact piece
- annual report
- small gifts – tech tags, keyboard stickers, window decals, facemasks



# Stewardship Red Flags



- Donors are not a monolith
- Proper attribution – make sure gift information is correct
- Thank the right person with correct titles – clean you database regularly
- Do not solicit in a thank you letter
- Avoid “donor like you” language
- Listen to donor preferences for acknowledgement – foundations do not want another plaque in their office
- Do not assume you know what the donor wants





# Group Discussions



We are going to go into breakout rooms now, and you'll have 10 minutes to discuss the following questions.

## Questions

- Does your organization have a stewardship plan?
- How are you reaching out to thank donors during COVID?
- Do you have a plan to engage first time donors?
- Can you share any ideas that have been particularly effective?

## RULES

- Facilitator – Help move the conversation along in your group
- Scribe – Take notes of main points
- Timer – Track the 10-minutes
- Reporter - Share what your group discussed when we reconvene



# Learn More About Our Center



Our Center's team is committed to strengthening the nonprofit sector, so please contact us to learn how we may help your organization or help you advance your nonprofit career.

For individual CNP staff contact information, please consult our directory under [Faculty & Staff](#).

Email: [bushschool.nonprofitmanagement@tamu.edu](mailto:bushschool.nonprofitmanagement@tamu.edu)

Phone: (979) 862-3195 | Fax: (979) 845-4155

Visit our webpage: <https://bush.tamu.edu/nonprofit/>

View Past Webinars and Research: <https://bush.tamu.edu/nonprofit/resources/>

Follow us for the latest:



**Center for  
Nonprofits & Philanthropy**  
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

[BUSH.TAMU.EDU/NONPROFIT](http://BUSH.TAMU.EDU/NONPROFIT)



**Center *for***  
**Nonprofits & Philanthropy**  
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY