Turning Insights into Action

A data-driven fundraising workshop

Today's presenters

donorperfect

Julia Gackenbach

10 years of nonprofit development experience

Ft. Lauderdale, FL

Jeff Vogel, MBA

20 years of marketing experience

Philadelphia, PA

Themes for today's presentation

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Data-driven segmentation

Creating target personas

Strategies by persona

Outcomes of today's presentation

Persona Name:

NETWORKER NICOLE

DONOR PERSONA

Age: **57**

Housing: **Suburban upper middle class home**

Family: **Married with young adult / college-aged children**

Education: **Bachelor's Degree**

Household Wealth Rating: **85**

Employment: **Self-employed PR consultant**

Social Media Usage: **Frequent social media user**

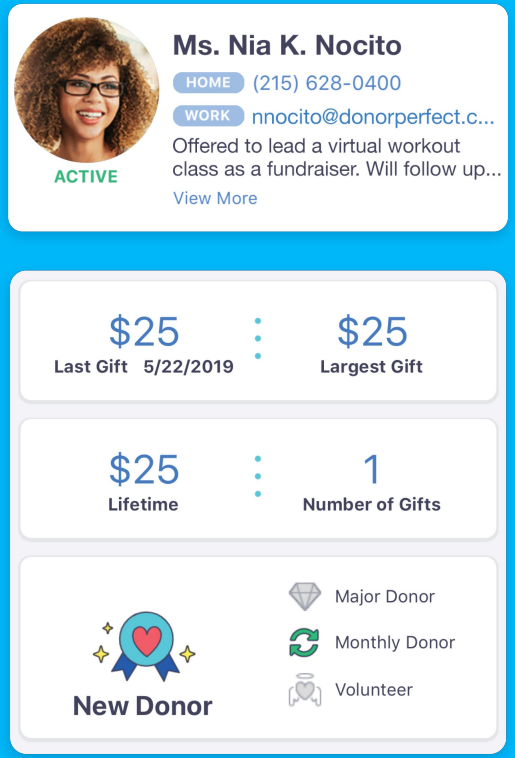
Giving Activity: **Supports several charities in her local community**

About:

Regularly attends social gatherings, events, and speakers. Enjoys personal travel and restaurant dining. Has more time to contribute now that kids are grown.

- Data-driven strategies to target a valuable donor segment
- Actionable personas based on your unique data

Donor data in your CRM



Why do we keep data on our donors?

What do we use the data to do?

Would more data let us do more?

Data enrichment

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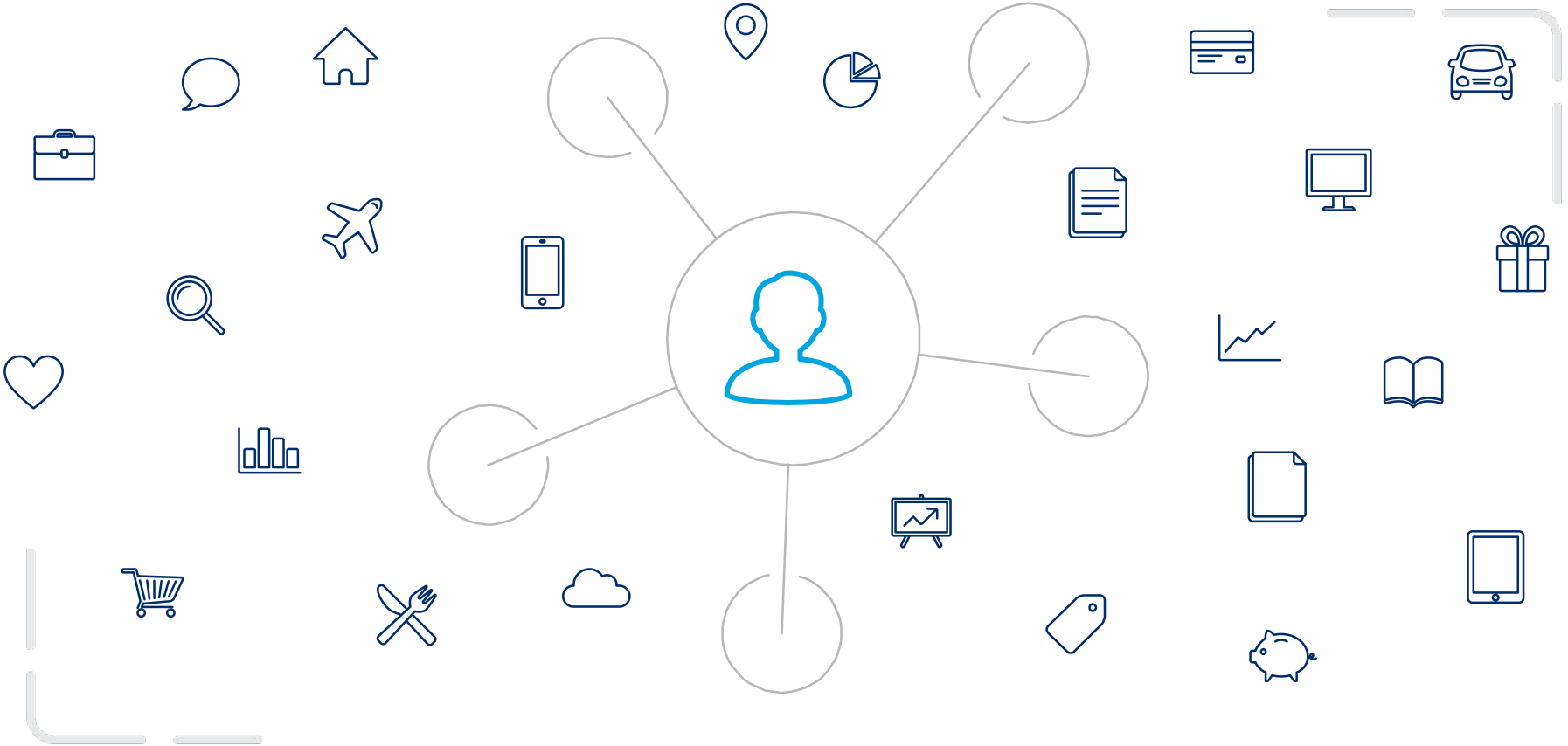


Lifestyle Attributes

- Wealth
- Marketing
- Household
- Interests
- Affinities
- Demographics

Wealth

Average Area Home Value
Average Area Household Income
Giving Capacity over 5 Year
Relative Household Income
Relative Value of Home
Wealth Rating

Marketing

Designated Market Area (DMA)
Level of Technology Adoption
Preferred Channel
Responsiveness to Direct Mail
Responsiveness to Email
Responsiveness to Phone
Responsiveness to SMS
Responsiveness to Social Media

Household

Children in the Household
Likelihood of Having an Adult Child
Veteran in Household

Affinities

Arts & Culture Causes
Children's Causes
Donate to Political Campaigns
Health Causes
International Aid Causes
Liberal Causes
Local Community Causes
Religious Causes
Veterans' Causes
Wildlife Preservation / Conservation Causes

Interests

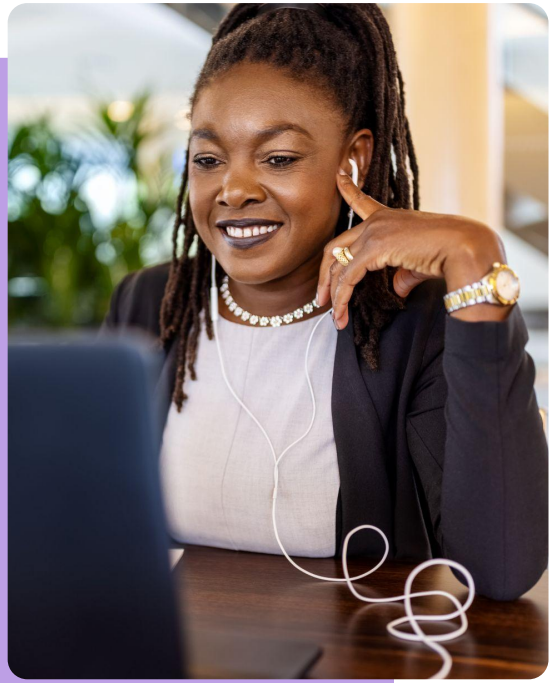
Art
Auto Parts & Accessories
Auto Racing
Auto Work
Aviation
Baseball
Basketball
Board Games & Puzzles
Boating & Sailing
Camping & Hiking
Casino Gaming
Cooking
Crafts
Education Interest
Electronic Gaming
Exercise
Fishing
Food and Wine
Football
Gardening
Golf
Hockey
Home Furnishings
Home Improvement
Hunting
Military History
Motorcycling
Music
Nascar
Natural Foods
Photography & Videography
Religion Interest
Running
Science Interest
Scuba Diving
Sewing & Knitting
Shooting
Skiing
Soccer
Sports
Sweepstakes
Tennis
Theater & Performing Arts
Travel - Cruises
Travel - Domestic
Travel - Generic
Travel - International
Walking
Woodworking

Advanced Demographics

Age Range
Business Ownership
Congressional District
Education Level
Gender
Generation
Gun Ownership
Home Ownership
Industry
Investor
IR Confidence
Marital Status
Occupation
Political Affiliation
Religious Affiliation
State with Highest Affinity
Veteran Status

Data sources

- Voter registration
- FEC political giving
- Credit bureaus
- Mortgage databases
- Census
- National Change of Address (NCOA)



The Clients

Organization A

About

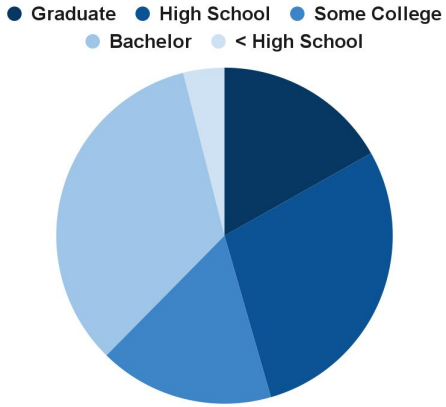
- West coast organization
- Human services sector
- 50,000+ constituent records
- Regular direct mail solicitations
- Personalized solicitations for major donors
- Spring and fall events
- Giving days
- End of year campaign
- Monthly giving program

2022 Goals

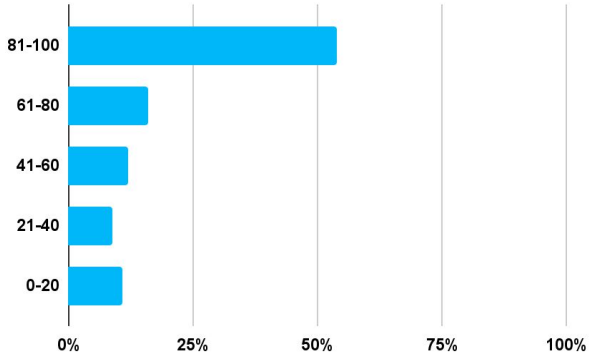
- Milestone campaign next year
- Expand major gift program
- Secure planned gifts

Organization A at a glance

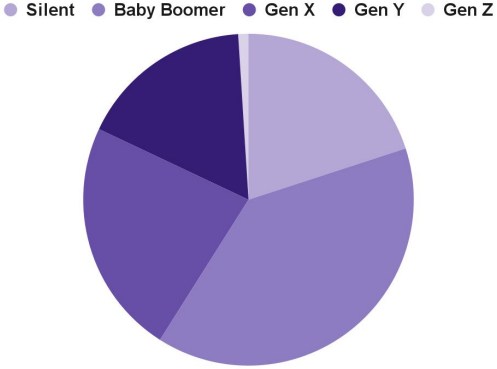
Education



Wealth Rating



Generation



Gender

57% Female

43% Male

Home value

$450,000

Household Income

$90,000

Organization B

About

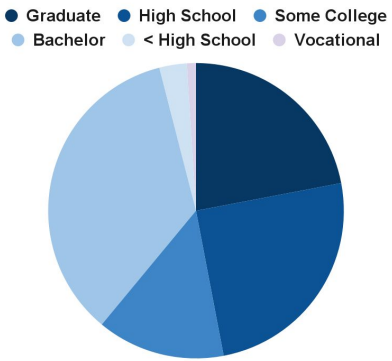
- East coast organization
- Healthcare sector
- 30,000+ constituent records
- Expert content creator for subscriber acquisition
- Annual appeals segmented by
  - First time donors
  - Clinicians
  - Research supporters
  - Corporate sponsors
- Giving days
- Events and conferences

2022 Goals

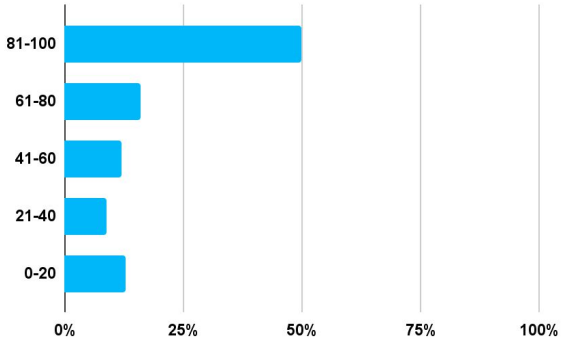
- Expand donor pool
- Reduce reliance on few major givers tied to founders
- Build on a growing concentrating in specific geographic areas

Organization B at a glance

Education



Wealth Rating



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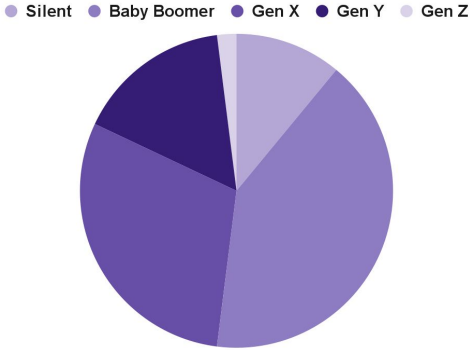

Gender

46% Female

54% Male

Home value

$350,000

Household Income

$88,000

Segmentation & Targeting

Segmentation

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Demographic data

- Age range
- Location
- Wealth rating
- Education
- Gender

Behavioral data

- Giving history
- Giving level
- Campaign participation
- Event attendance

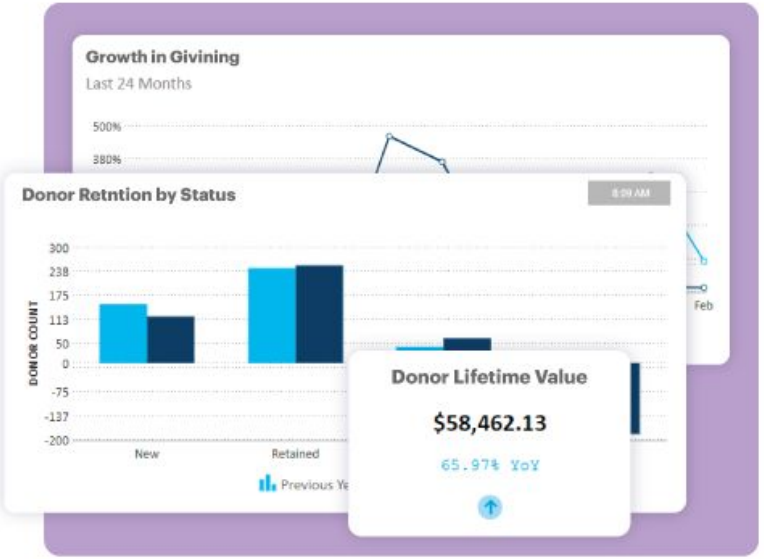
Segment:

Discrete group with defined characteristics

Gift and donor data

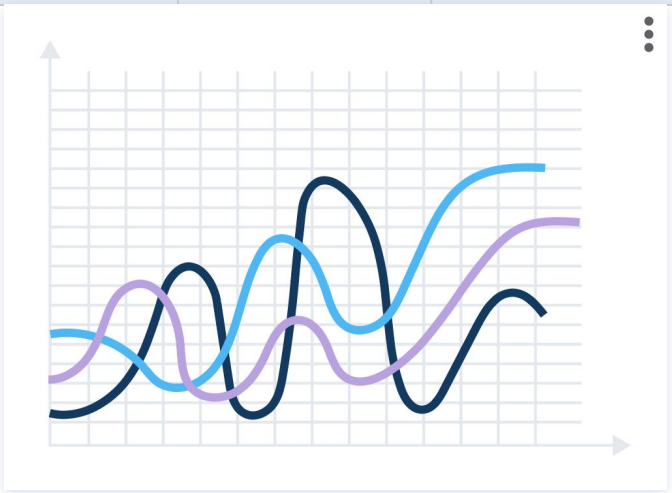
Show me donors who made a gift:

- on Giving Tuesday
- on 12/31
- in prior year but not in current year (LYBUNT)
- in prior year and more in current year (upgrades)
- 2 or more gifts in last 3 years (retained)
- in each of the last 3 years and gave more each time (repeat upgrades)



Demographic data per donor segment

	2019	2020	2021
# of Donors			
# of Donors who Gave on GT			
# of Donors who Gave on 12/31			
People who Gave in Prior Year and Not in Current Year			
# of Donors who Gave in Prior Year and More in Current Year			
# of Donors who Gave over Past 3 Years and Increased Each Year			
# of People who have Given 1 Gift over Past 3 Years			
# of People who have Given 2 or More Gifts over Past 3 Years			



Organization A

Segment: College + Graduate School

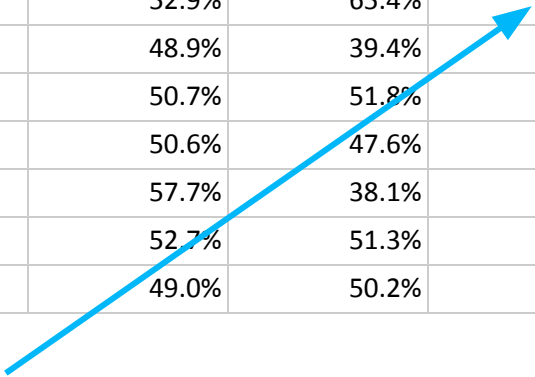
	2019	2020	2021
# of Donors	56.6%	62.0%	63.7%
# of Donors who Gave on GT	64.7%	76.9%	68.2%
# of Donors who Gave on 12/31	76.6%	69.7%	72.5%
People who Gave in Prior Year and Not in Current Year	58.1%	50.9%	59.4%
# of Donors who Gave in Prior Year and More in Current Year	65.8%	71.7%	64.7%
# of Donors who Gave over Past 3 Years and Increased Each Year	63.5%	71.4%	77.3%
# of People who have Given 1 Gift over Past 3 Years	53.8%	55.8%	54.9%
# of People who have Given 2 or More Gifts over Past 3 Years	58.9%	59.0%	60.9%

3/4 of donors who upgraded each of the last three years are highly educated

Organization A

Segment: Female

	2019	2020	2021
# of Donors	50.0%	50.0%	51.0%
# of Donors who Gave on GT	52.9%	65.4%	68.2%
# of Donors who Gave on 12/31	48.9%	39.4%	62.5%
People who Gave in Prior Year and Not in Current Year	50.7%	51.8%	51.4%
# of Donors who Gave in Prior Year and More in Current Year	50.6%	47.6%	51.9%
# of Donors who Gave over Past 3 Years and Increased Each Year	57.7%	38.1%	54.5%
# of People who have Given 1 Gift over Past 3 Years	52.7%	51.3%	52.8%
# of People who have Given 2 or More Gifts over Past 3 Years	49.0%	50.2%	49.8%



2/3 of donations on Giving Tuesday were from people identified as women

Organization A

Segment: Wealth Rating 81 - 100

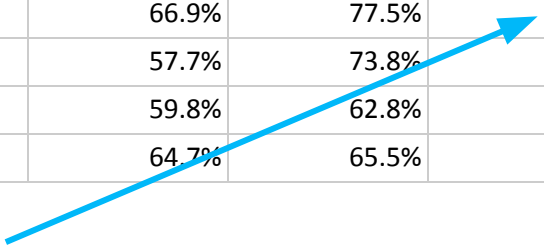
	2019	2020	2021
# of Donors	63.6%	69.8%	70.9%
# of Donors who Gave on GT	64.7%	69.2%	63.6%
# of Donors who Gave on 12/31	74.5%	81.8%	77.5%
People who Gave in Prior Year and Not in Current Year	62.7%	57.0%	65.5%
# of Donors who Gave in Prior Year and More in Current Year	74.1%	77.0%	74.3%
# of Donors who Gave over Past 3 Years and Increased Each Year	76.9%	83.3%	81.8%
# of People who have Given 1 Gift over Past 3 Years	58.5%	62.1%	60.0%
# of People who have Given 2 or More Gifts over Past 3 Years	66.2%	65.4%	68.5%

82% of donors who upgraded each of the last three years are in the highest wealth quintile

Organization A

Segment: Silent Generation + Boomer

	2019	2020	2021
# of Donors	62.1%	74.1%	73.2%
# of Donors who Gave on GT	82.4%	69.2%	68.2%
# of Donors who Gave on 12/31	78.7%	72.7%	72.5%
People who Gave in Prior Year and Not in Current Year	64.5%	53.3%	71.6%
# of Donors who Gave in Prior Year and More in Current Year	66.9%	77.5%	78.6%
# of Donors who Gave over Past 3 Years and Increased Each Year	57.7%	73.8%	75.0%
# of People who have Given 1 Gift over Past 3 Years	59.8%	62.8%	61.3%
# of People who have Given 2 or More Gifts over Past 3 Years	64.7%	65.5%	69.3%



3/4 of donors who upgraded last year are older than 65

Organization A

Segment: Gen X + Millennial

	2019	2020	2021
# of Donors	28.8%	21.6%	22.1%
# of Donors who Gave on GT	5.9%	26.9%	27.3%
# of Donors who Gave on 12/31	19.1%	24.2%	22.5%
People who Gave in Prior Year and Not in Current Year	29.3%	34.2%	23.7%
# of Donors who Gave in Prior Year and More in Current Year	30.0%	18.3%	18.2%
# of Donors who Gave over Past 3 Years and Increased Each Year	40.4%	23.8%	20.5%
# of People who have Given 1 Gift over Past 3 Years	29.2%	28.2%	29.5%
# of People who have Given 2 or More Gifts over Past 3 Years	29.6%	28.5%	24.5%

25% of donors across most categories belong to Gen X + Millennial segment

Organization A key takeaways

Power Segments:

- Silent + Boomer
- Wealth Rating 81-100
- Women on Giving Tuesday and EOY
- College + Grad for upgrades

Organization B

Segment: College + Graduate

	2019	2020	2021
# of Donors	65.8%	63.4%	63.1%
# of Donors who Gave on GT	55.6%	66.7%	75.0%
# of Donors who Gave on 12/31	72.7%	91.7%	83.3%
People who Gave in Prior Year and Not in Current Year	61.4%	63.0%	59.5%
# of Donors who Gave in Prior Year and More in Current Year	70.2%	66.7%	65.4%
# of Donors who Gave over Past 3 Years and Increased Each Year	71.4%	58.3%	75.0%
# of People who have Given 1 Gift over Past 3 Years	60.3%	59.9%	60.1%
# of People who have Given 2 or More Gifts over Past 3 Years	69.1%	66.8%	64.8%

83% of donations on the last day of the year came from highly educated people

Organization B

Fewer than half of total donors are identified as women

Segment: Female

	2019	2020	2021
# of Donors	30.6%	39.8%	44.3%
# of Donors who Gave on GT	38.9%	44.4%	62.5%
# of Donors who Gave on 12/31	36.4%	50.0%	66.7%
People who Gave in Prior Year and Not in Current Year	32.9%	24.8%	40.5%
# of Donors who Gave in Prior Year and More in Current Year	36.8%	38.6%	46.2%
# of Donors who Gave over Past 3 Years and Increased Each Year	14.3%	58.3%	62.5%
# of People who have Given 1 Gift over Past 3 Years	35.0%	32.6%	40.2%
# of People who have Given 2 or More Gifts over Past 3 Years	31.3%	34.2%	36.0%

2/3 of donations on the last day of the year came from people identified as women

Organization B

83% of donors who made a gift on the last day of the year were in the top wealth quintile

Wealth Rating 81 - 100

	2019	2020	2021
# of Donors	65.3%	64.0%	60.5%
# of Donors who Gave on GT	66.7%	77.8%	56.3%
# of Donors who Gave on 12/31	50.0%	66.7%	83.3%
People who Gave in Prior Year and Not in Current Year	62.1%	60.4%	57.2%
# of Donors who Gave in Prior Year and More in Current Year	75.4%	66.7%	76.9%
# of Donors who Gave over Past 3 Years and Increased Each Year	71.4%	83.3%	75.0%
# of People who have Given 1 Gift over Past 3 Years	62.6%	57.6%	53.0%
# of People who have Given 2 or More Gifts over Past 3 Years	70.4%	68.8%	67.2%

3/4 of donors who upgraded are in the top wealth quintile

Organization B

Half of givers last year but not yet this year were from people in their 30s-50s

Segment: Gen X + Millennial

	2019	2020	2021
# of Donors	34.5%	40.4%	37.9%
# of Donors who Gave on GT	33.3%	33.3%	43.8%
# of Donors who Gave on 12/31	50.0%	41.7%	16.7%
People who Gave in Prior Year and Not in Current Year	44.3%	36.5%	48.0%
# of Donors who Gave in Prior Year and More in Current Year	24.6%	28.1%	32.1%
# of Donors who Gave over Past 3 Years and Increased Each Year	14.3%	16.7%	43.8%
# of People who have Given 1 Gift over Past 3 Years	39.5%	45.6%	44.0%
# of People who have Given 2 or More Gifts over Past 3 Years	31.9%	33.9%	36.0%

44% of donors who upgraded their gifts were from this segment

81 - 100, Male	2019	2020	2021
# of Donors	43.5%	37.9%	30.2%
# of Donors who Gave on GT	44.4%	33.3%	12.5%
# of Donors who Gave on 12/31	22.7%	33.3%	33.3%
People who Gave in Prior Year and Not in Current Year	37.1%	42.6%	33.5%
# of Donors who Gave in Prior Year and More in Current Year	47.4%	43.9%	39.7%
# of Donors who Gave over Past 3 Years and Increased Each Year	57.1%	41.7%	37.5%
# of People who have Given 1 Gift over Past 3 Years	35.8%	35.3%	27.4%
# of People who have Given 2 or More Gifts over Past 3 Years	48.0%	44.9%	42.2%
81 - 100, Female	**2019**	**2020**	**2021**
# of Donors	20.7%	24.8%	30.0%
# of Donors who Gave on GT	22.2%	44.4%	43.8%
# of Donors who Gave on 12/31	27.3%	33.3%	50.0%
People who Gave in Prior Year and Not in Current Year	23.6%	17.4%	22.0%
# of Donors who Gave in Prior Year and More in Current Year	29.8%	22.8%	37.2%
# of Donors who Gave over Past 3 Years and Increased Each Year	14.3%	50.0%	43.8%
# of People who have Given 1 Gift over Past 3 Years	25.8%	21.2%	25.4%
# of People who have Given 2 or More Gifts over Past 3 Years	21.4%	23.3%	24.1%

Declining trends

Improving trends

Organization B key takeaways

Power Segments:

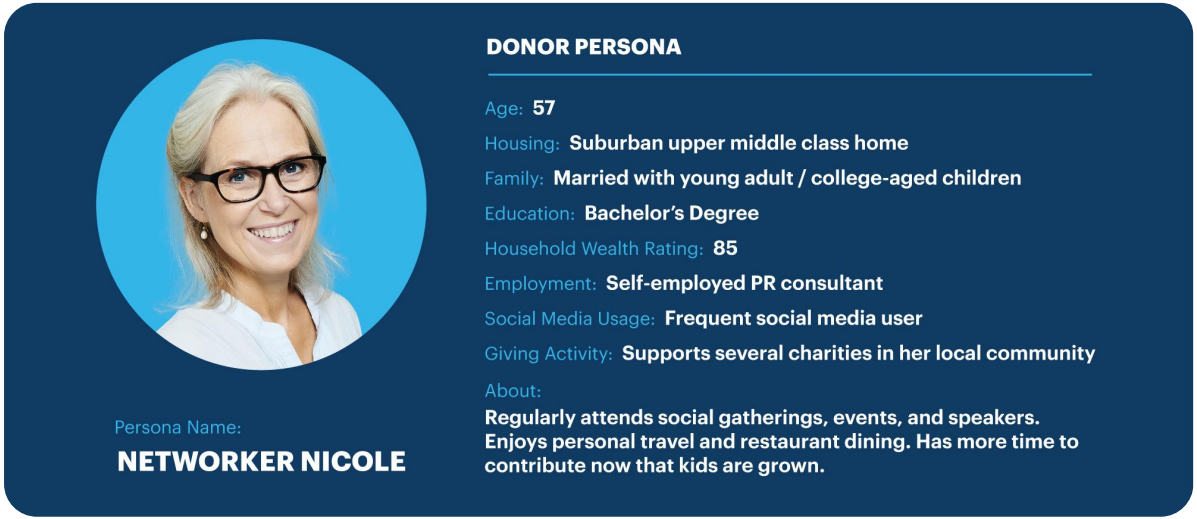
- College + Grad
- Wealth Rating 81 - 100 (leaning to women)
- Women on Giving Tuesday and EOY

Segment of Greatest Opportunity:

- Gen X + Millennial

Donor Personas

Personas, not stereotypes



- Personas should be a person you can visualize
- Personas do not assume that all people are the same
- Personas help you sharpen your focus on a specific individual

Organization A: Power persona

Boomer Barbara

Age: 70

Location: Lives in suburbs and has a lake house

Family: Married with adult children who now have their own kids

Professional Background: Retired community college professor

Weath: Rating is 85, Wealth comes from family

Giving Interests: Key decision maker for family giving, loyal giver, enjoys socializing at fundraising events, familiar with nonprofit sector and has supported many throughout life, has served as a board member at more than one organization

Hobbies & Social Interactions: Plays piano and paints, takes grandchildren on vacations, gourmet cook, book club host, facebook user, volunteer

Organization A: Opportunity persona

Genevieve X

Age: 43

Location: Lives in a townhouse in a residential neighborhood in the city

Family: Married. Mother of young kids and active in children's lives. Husband works for tech company.

Professional Background: Works from home with a flexible schedule as a project manager

Weath: Wealth rating is 82. Mid career professional

Giving Interests: Socially and politically liberal, focus on education and healthcare, involved in local politics.

Hobbies & Social Interactions: Instagram and Pinterest user, Wears name brands to weekly yoga classes, member of co-op supermarket, supports local business, has a full social calendar

Organization B: Power persona

Boomer Bruce

Age: 74

Location: Owns a high-rise condominium and a beach house

Family: Widower in a long term relationship, adult children live in Florida and Connecticut

Professional Background: Lawyer, senior partner approaching retirement

Weath: Wealth rating 91

Giving Interests: Passionate about criminal justice reform, making his city safer, supports pancreatic cancer research because of a family member, supports his temple and participates in golf events and fun runs

Hobbies & Social Interactions: Member of a country club, swims each morning at the gym, attends the orchestra, travel, fine dining, season tickets to basketball

Organization B: End of Year persona

Silent Susan

Age: 85

Location: upscale assisted living facility

Family: New great-grandmother and has regular visits from children now in their 60s

Professional Background: Never worked outside of the home

Weath: Wealth rating 92, money from family real estate holdings

Giving Interests: Supports local PBS station, has a planned gift for a literacy organization, donor to over 30 different organizations

Hobbies & Social Interactions: Plays mahjong and canasta, bakes, attends nightly social events at her center, loves watching Dancing with the Stars

Organization B: Opportunity persona

Millennial Mike

Age: 39

Location: First home in suburbs and commutes to the city

Family: Married with 3-year old twins

Professional Background: IT professional, retired Army

Weath: Wealth rating 70

Giving Interests: Supports political organizations, his church, and behavioral health research organizations that impact his family

Hobbies & Social Interactions: Regular neighborhood poker game, plays golf at local public courses, hosts large barbecues for football Sundays

Differentiated messaging

Boomer Barbara - leave a legacy, consider the next generation

Genevieve X - make social impact, high level of urgency

Boomer Bruce - leave your legacy (donor is special)

Silent Susan - urgency, call to action, immediate impact

Millennial Mike - it's your turn to change the world

Advertising to your persona

What does your **target segment** look like?

How can you reach them?

What message will resonate?

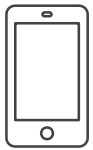
Google Display Network

Bing ads

AdRoll

facebook

LinkedIn



PHONE

DIRECT MAIL

TV

RADIO

EMAIL

Targeting criteria

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Donor Demographics

Gender

Women (80%)

Men (20%)

View Details

Age

54 - 64 (80%)

24 - 34 (20%)

View Details

Education

Bachelor (74%)

Graduate (24%)

View Details

Marital Status

Married (80%)

Non-traditional (20%)

View Details

Political Affiliation

Republican (80%)

Demograt (20%)

View Details

Religious Affiliation

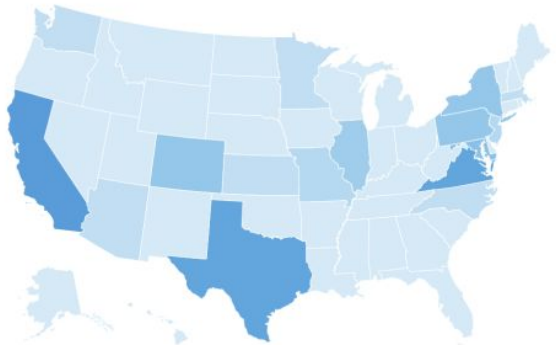
Christian (80%)

Jewish (4%)

View Details

Top 5 Interests

1	Exercise Aerobic
2	Aviation
3	Scuba Diving
4	Photography Video
5	Foods Natural



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DIY

The process

- Define your goals and your own most valued segments
- Append your donor records with external data
- Create segments of focus and opportunity
- Develop donor personas for each major segment
- Validate the personas with your staff
- Craft appropriate messages for each persona
- Continue to use data and interviews to evolve your personas

Where to start

When developing your donor personas, consider the following:

- How would they view your organization in the context of their life?
- What types of media and activities do they engage with?
- What are their motivations to support your organization?
- What do they want to accomplish in their personal and professional lives?
- What gets in their way?
- What excites them?

Create segmented campaigns

Lead with differentiated messaging

A/B test persona-driven campaign vs. baseline

Focus on communication channels that appeal to each persona

Be a data detective

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Ask a data-minded supporter for funds to do your donor research

Follow the data. Your relationship with your givers provides context

Look for concentration of attributes within donor segments

Find a volunteer or freelancer to help analyze your data

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Conclusion

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Data-driven segmentation

Creating target personas

Strategies by persona

Questions

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