

ANNUAL GIVING

BOOT CAMP

Strategies for Increasing Donor Gift Levels

Rebecca Leddick, Customer Success Manager



Topics to Cover

Gift Band Performance: Reeher Community Benchmark

Identifying Targets: Gift Band Migration Exercise

Discussion

ANNUAL GIVING

BOOT CAMP

MARCH 17-18, 2015 | MINNEAPOLIS



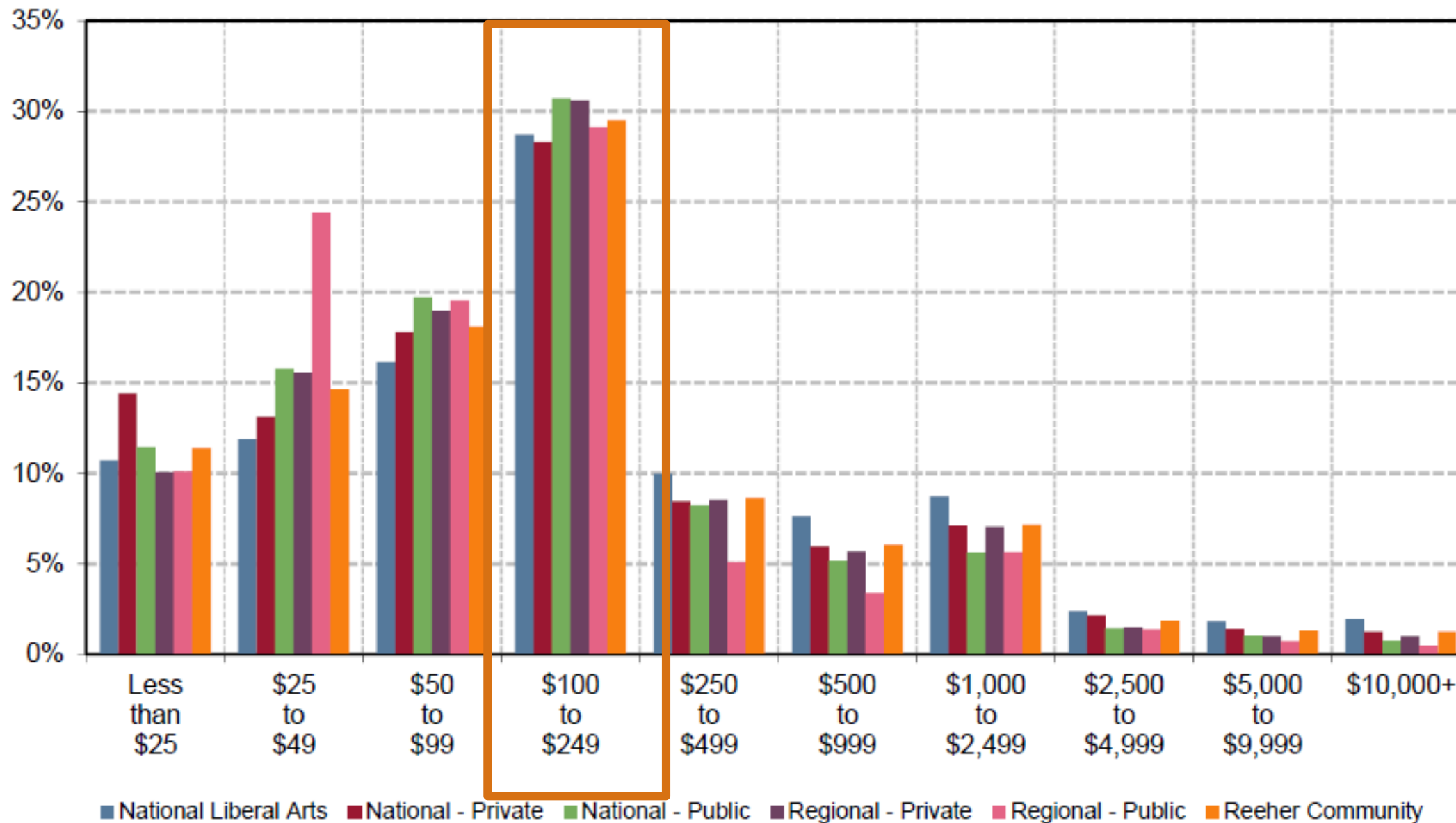
Reeher Community Gift Band Performance

ANNUAL GIVING

BOOT CAMP



Reeher Community Benchmark – Annual Fund Gift Band Performance 2014



Reeher Community Benchmark – Annual Fund Gift Band Performance 2014

	Less than \$25	\$25 to \$49	\$50 to \$99	\$100 to \$249	\$250 to \$499	\$500 to \$999	\$1,000 to \$2,499	\$2,500 to \$4,999	\$5,000 to \$9,999	\$10,000+
National Liberal Arts										
Average	11%	12%	16%	29%	10%	8%	9%	2%	2%	2%
Max	23%	20%	22%	34%	16%	12%	15%	4%	4%	5%
Min	5%	4%	11%	18%	6%	5%	4%	1%	1%	0%
National - Private										
Average	14%	13%	18%	28%	8%	6%	7%	2%	1%	1%
Max	35%	18%	22%	35%	11%	9%	12%	4%	3%	3%
Min	3%	8%	13%	20%	5%	3%	3%	1%	1%	0%
National - Public										
Average	11%	16%	20%	31%	8%	5%	6%	1%	1%	1%
Max	27%	26%	25%	40%	11%	10%	14%	4%	2%	2%
Min	3%	6%	14%	24%	6%	2%	1%	0%	0%	0%
Regional - Private										
Average	10%	16%	19%	31%	9%	6%	7%	1%	1%	1%
Max	26%	20%	24%	36%	12%	8%	12%	3%	4%	5%
Min	5%	10%	14%	25%	5%	4%	3%	1%	0%	0%
Regional - Public										
Average	10%	24%	20%	29%	5%	3%	6%	1%	1%	0%
Max	16%	29%	25%	36%	6%	5%	9%	3%	2%	1%
Min	4%	22%	13%	22%	3%	1%	1%	0%	0%	0%
Reeher Community										
Average	11%	15%	18%	30%	9%	6%	7%	2%	1%	1%
Max	35%	29%	25%	40%	16%	12%	15%	4%	4%	5%
Min	3%	4%	11%	18%	3%	1%	1%	0%	0%	0%

Gift Band Migration Exercise

Reeher Platform Viewports and Tools

ANNUAL GIVING

BOOT CAMP



Gift Band Migration Exercise

Identify those individuals not pulling their weight

Identify the next gift band level ask amount




ANNUAL GIVING

BOOT CAMP

© 2014 Reeher LLC



Annual Fund Operating Reports – Gift Band Summary Dollar Performance

Gift Band Summary						Period	Fiscal Year to Date			
Dollar Performance										
Giving Level	FYTD 2011	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	Unit Change	% Change			
Less than \$25	\$12,838	\$17,732	\$18,419	\$15,788	\$18,162	\$2,373	15.0%			
\$25 to \$49	\$117,457	\$113,659	\$101,750	\$113,423	\$103,949	(\$9,474)	-8.4%			
\$50 to \$99	\$163,613	\$186,593	\$173,407	\$207,541	\$220,139	\$12,598	6.1%			
\$100 to \$249	\$408,283	\$421,171	\$427,107	\$467,799	\$598,135	\$130,336	27.9%			
\$250 to \$499	\$243,207	\$274,981	\$266,008	\$284,253	\$367,180	\$82,927	29.2%			
\$500 to \$999	\$479,358	\$420,910	\$401,759	\$440,320	\$456,213	\$15,893	3.6%			
\$1,000 to \$2,499	\$1,353,648	\$1,607,887	\$1,610,787	\$1,439,326	\$1,514,818	\$75,493	5.2%			
\$2,500 to \$4,999	\$606,723	\$689,903	\$795,231	\$661,568	\$776,669	\$115,102	17.4%			
\$5,000 to \$9,999	\$754,554	\$766,847	\$924,196	\$1,053,318	\$966,112	(\$87,206)	-8.3%			
\$10,000 to \$24,999	\$210,396	\$303,893	\$278,890	\$338,197	\$514,793	\$176,596	52.2%			
\$25,000 to \$49,999	\$34,994	\$37,772	\$0	\$119,599	\$100,850	(\$18,749)	-15.7%			
\$50,000+	\$126,060	\$159,542	\$220,094	\$284,184	\$180,171	(\$104,013)	-36.6%			
Total	\$4,511,132	\$5,000,890	\$5,217,647	\$5,425,317	\$5,817,191	\$391,875	7.2%			

Identify which gift bands are over and under performing in dollar value.

Annual Fund Operating Reports – Gift Band Summary Donor Performance

Donor Performance

Giving Level	FYTD 2011	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	Unit Change	% Change
Less than \$25	<u>905</u>	<u>1,312</u>	<u>1,432</u>	<u>1,154</u>	<u>1,335</u>	181	15.7%
\$25 to \$49	<u>4,584</u>	<u>4,446</u>	<u>4,115</u>	<u>4,639</u>	<u>4,233</u>	-406	-8.8%
\$50 to \$99	<u>3,282</u>	<u>3,676</u>	<u>3,642</u>	<u>4,423</u>	<u>4,594</u>	171	3.9%
\$100 to \$249	<u>3,680</u>	<u>3,726</u>	<u>3,958</u>	<u>4,403</u>	<u>5,526</u>	1,123	25.5%
\$250 to \$499	<u>1,003</u>	<u>1,090</u>	<u>1,089</u>	<u>1,239</u>	<u>1,535</u>	296	23.9%
\$500 to \$999	<u>1,182</u>	<u>934</u>	<u>918</u>	<u>980</u>	<u>1,042</u>	62	6.3%
\$1,000 to \$2,499	<u>1,725</u>	<u>2,055</u>	<u>2,003</u>	<u>1,825</u>	<u>1,862</u>	37	2.0%
\$2,500 to \$4,999	<u>315</u>	<u>363</u>	<u>429</u>	<u>388</u>	<u>418</u>	30	7.7%
\$5,000 to \$9,999	<u>188</u>	<u>211</u>	<u>236</u>	<u>265</u>	<u>239</u>	-26	-9.8%
\$10,000 to \$24,999	<u>39</u>	<u>49</u>	<u>45</u>	<u>51</u>	<u>76</u>	25	49.0%
\$25,000 to \$49,999	<u>2</u>	<u>2</u>	<u>1</u>	<u>6</u>	<u>5</u>	-1	-16.7%
\$50,000+	<u>1</u>	<u>1</u>	<u>2</u>	<u>4</u>	<u>1</u>	-3	-75.0%
Total	<u>16,906</u>	<u>17,865</u>	<u>17,870</u>	<u>19,377</u>	<u>20,866</u>	1,489	7.7%

Identify which gift bands are over and under performing in donor value.

Reeher Platform Viewports: Gift Band Comparison

Gift Band Comparison			
Gift Band	FYTD 2014	FYTD 2015	% Change
Less than \$25	<u>1,199</u>	<u>1,390</u>	15.9%
\$25 to \$49	<u>4,805</u>	<u>4,435</u>	-7.7%
\$50 to \$99	<u>4,575</u>	<u>4,756</u>	4.0%
\$100 to \$249	<u>4,506</u>	<u>5,662</u>	25.7%
\$250 to \$499	<u>1,272</u>	<u>1,572</u>	23.6%
\$500 to \$999	<u>990</u>	<u>1,076</u>	8.7%
\$1,000 to \$2,499	<u>1,869</u>	<u>1,897</u>	1.5%
\$2,500 to \$4,999	<u>394</u>	<u>424</u>	7.6%
\$5,000 to \$9,999	<u>272</u>	<u>243</u>	-10.7%
\$10,000 to \$24,999	<u>55</u>	<u>79</u>	43.6%
\$25,000 to \$49,999	<u>5</u>	<u>4</u>	-20.0%
\$50,000+	<u>5</u>	<u>2</u>	-60.0%
Total	<u>19,947</u>	<u>21,540</u>	8.0%

Reeher Platform Viewports: Gift Band Migration



Gift Band Migration									
FYTD 2015									
Cash Donors									
Gift Band FY 2014	\$0	<\$100	\$100 - \$249	\$250 - \$499	\$500 - \$999	\$1K - \$2.49K	\$2.5K - \$4.99K	\$5K - \$9.99K	\$10K+
<\$100	<u>7,146</u>	<u>4,531</u>	<u>611</u>	<u>45</u>	<u>25</u>	<u>22</u>	<u>7</u>	<u>2</u>	<u>3</u>
\$100 - \$249	<u>3,013</u>	<u>858</u>	<u>1,979</u>	<u>293</u>	<u>61</u>	<u>44</u>	<u>4</u>	<u>3</u>	<u>1</u>
\$250 - \$499	<u>758</u>	<u>61</u>	<u>363</u>	<u>436</u>	<u>113</u>	<u>38</u>	<u>3</u>	<u>6</u>	<u>0</u>
\$500 - \$999	<u>491</u>	<u>33</u>	<u>102</u>	<u>154</u>	<u>286</u>	<u>118</u>	<u>11</u>	<u>3</u>	<u>0</u>
\$1K - \$2.49K	<u>806</u>	<u>64</u>	<u>108</u>	<u>66</u>	<u>236</u>	<u>988</u>	<u>77</u>	<u>27</u>	<u>3</u>
\$2.5K - \$4.99K	<u>329</u>	<u>42</u>	<u>138</u>	<u>30</u>	<u>55</u>	<u>260</u>	<u>173</u>	<u>18</u>	<u>20</u>
\$5K - \$9.99K	<u>142</u>	<u>10</u>	<u>31</u>	<u>15</u>	<u>16</u>	<u>45</u>	<u>52</u>	<u>76</u>	<u>16</u>
\$10K+	<u>28</u>	<u>1</u>	<u>12</u>	<u>7</u>	<u>4</u>	<u>3</u>	<u>11</u>	<u>29</u>	<u>27</u>




Target List for Upgrades

Cross Tab



Gift Band Migration							
\$500 - \$999, \$0 - FY2015 (Cash)							
491 records found.							
export columns view:							
Entity ID	First Name	Last Name	Home Zip Code	Home State	Primary Relationship Type	Age	Cumulative Annual Fund Commitments
100670	Jerry	Addrisi	42301	KY	Other	62	\$67,368
101412	C.	Yates	41777	KY	Alumni	94	\$2,185
104375	Carl	Laubenthal	56634	MN	Alumni	60	\$2,342
104491	Jeffrey	Killian	21106	MD	Alumni	57	\$5,500
105837	Deborah	Alpiner	55001	MN	Alumni	56	\$6,526
106565	Joe	Caringi	93004	CA	Alumni	61	\$3,775
106806	James	Kohl	55954	MN	Alumni	56	\$4,995
108035	Gregory	Alpiner	55001	MN	Alumni	57	\$7,716
108459	David	Pichumani	40165	KY	Alumni	61	\$2,175
109552	John	Davis	48167	MI	Alumni	62	\$3,150
109641	Laura	Oh	14453	NY	Alumni	61	\$6,368
110409	Deborah	Driscoll	56088	MN	Alumni	55	\$1,050
111722	Michael	Patel	56081	MN	Alumni	57	\$650
111851	Elizabeth	Morand	55315	MN	Alumni	55	\$4,775
113045	Susan	Welsh	52314	IA	Alumni	55	\$14,327

Target Upgrade List in Cross Tab

Gift Band Migration														
\$500 - \$999, \$0 - FY2015 (Cash)														
AF PDI	Net Worth											Apply	Export	view:   
AF PDI	Greater than \$1,999,999	\$1,000,000 - \$1,999,999	\$500,000 - \$999,999	\$250,000 - \$499,999	\$100,000 - \$249,999	\$50,000 - \$99,999	\$25,000 - \$49,999	\$10,000 - \$24,999	\$5,000 - \$9,999	\$1 - \$4,999	Less than \$1			
93	0	1	0	0	0	0	0	0	0	0	0			
91	2	0	1	1	0	0	0	0	0	0	0			
90	1	0	1	0	0	0	0	0	0	0	0			
89	5	0	0	1	0	0	0	0	0	0	0			
88	4	0	2	0	0	0	0	0	0	0	0			
87	3	3	1	0	1	0	0	0	0	0	0			
86	0	1	0	5	1	0	0	0	0	0	0			
85	4	0	2	1	0	0	0	0	0	0	0			
84	3	0	0	3	1	0	0	0	0	0	1			
83	0	2	1	2	1	0	0	0	0	0	0			
82	5	0	7	1	1	0	3	0	0	0	0			
81	0	1	1	8	0	0	0	0	0	0	0			
80	2	1	0	0	4	0	1	0	0	0	0			
79	8	2	4	1	1	0	0	0	0	0	0			
78	0	0	0	2	0	2	1	0	0	0	0			

Tools Available for Targeting Upgrade Prospects

Targeter Filters

- Age
- AF PDI
- Net Worth
- Cumulative AF Commitments – Previous Year
- AF Expected Value

Display Columns

- Cumulative AF Commitments – Previous Year
- Cumulative AF Commitments – Current Year
- Net Worth
- AF Expected Value

Viewports

- Gift Band Migration
- Operating Reports

Cross Tab

Drilldown

Add List

ANNUAL GIVING

BOOT CAMP

© 2014 Reeher LLC





Related Boot Camp Sessions

Forecasts and the Path to Strategic Goal Setting

Direct Marketing 202: Testing Best Practices

ANNUAL GIVING

BOOT CAMP

© 2014 Reeher LLC



Thank You.

Rebecca Leddick

Customer Success Manager

rebecca.lednick@reeher.com

ANNUAL GIVING

BOOT CAMP

© 2014 Reeher LLC

