

GlobalGiving Partner Retention Analysis

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Partner Retention Metrics

GlobalGiving aims to accelerate community-led change through support to nonprofit partners by connecting them to donors and companies. Retention of partner nonprofit organizations is a key part of the work GlobalGiving does, since those relationships serve as the foundation for the ultimate goal of accelerating community-led change. Analysis of nonprofit partner retention can help GlobalGiving better understand factors impacting longevity of these relationships and changes over time to target impactful areas in designing programs to support long-term relationships. Presented below is an initial analysis of GlobalGiving partner retention, providing key metrics and next steps for further inquiry.

GlobalGiving nonprofit partner retention metrics aim to capture the percentage of partners retained over time. Retention can be evaluated based on many different types of events occurring for partner organizations. This analysis focuses on two main retention metrics:

1. **Retention of partners as members**- maintaining partners as members of the GlobalGiving community (i.e., being allowed to post projects), as indicated by a non-delinquent status.
2. **Retention of partners with active projects**- maintaining partners as members of the GlobalGiving community with active projects as indicated by one or more active project or project start date in the previous month.

The time period retention is calculated over is intended to match the timeframe in which partners would typically engage with the GlobalGiving platform. This analysis evaluates retention over the period of one month under the assumption that the goal is for partner organizations to remain members without letting their vetting expire without renewal in a given month and actively engage by posting or having at least one active project every month. These timeframes could be evaluated further and retention metrics calculated across different time scales depending on specific time periods of interest. For example, for retention metrics measuring if a partner organization has an active project, one year may be a more appropriate time frame for measuring retention if some fully engaged partners only post a project once annually to cover annual operating costs.

Based on the most recent dates in the provided data, the data appear to have been queried on September 17, 2020, so the retention metrics presented here covered the month period from August 18, 2020 to September 17, 2020. For calculation of retention, active partners at the beginning of this period were identified as organizations with an original vetting approval data before August 18, 2020 (to remove new partners that joined after the start of the period of analysis) and a vetting expiration date on or after August 18, 2020 (to only include partners that would have been in an active status as of the beginning of the period of analysis). To estimate retention of partners as members, the members partners at the end of the period (on

September 17, 2020) were identified as organization having a “status” indicating they are GlobalGiving community member, with all organizations with a status other than “Delinquent - Due Diligence” considered members. To estimate retention of partners with active projects, the active partners at the end of the period (on September 17, 2020) were identified as organization having at least one active projects (“number_of_currently_active_projects” greater than 0) or a project created in the preceding month (“most_recent_project_created_date” on or after August 18, 2020).

Tracking Partner Retention

In order to help GlobalGiving staff track changes in partner retention over time and factors impacting partner retention, an automated monthly report or interactive dashboard could be developed to clearly show key factors. As an initial example, two draft figures were developed to show what may be included in this type of report. The first figure summarizing the retention rate of non-profit partners as community members over the past month (Figure 1) shows the overall retention rate, bar charts showing this metric compared for sub-groups by their accelerator program completion and acquisition source to show if these factors have impacted member retention in the past month, and boxplots comparing the number of funded projects, number of active projects, and number of field visits by the member retention status to show variations in these factors that may have impacted retention over the past month. The second figure summarizes the retention rate of non-profit partners with active projects over the past month (Figure 2), showing comparisons of this retention rate across several variables as in Figure 1. There are many improvements that could be made to these figures, including through iterative discussions with the intended user of these reports, before they would be automated for regular use.

There are several interesting insights from these initial retention metric reports. Unexpectedly, partners that did not complete the accelerator program had a higher rate of retention based on active projects (72.56%) than those that did (7.1%). Also, partners acquired through corporate channels had the highest rate of retention based on active projects (76.98%), with the lowest rate for partners acquired through field channels (14.37%). However, there may be correlations between the variables presented that would need to be accounted for, so further analyses would be necessary before drawing any conclusions.

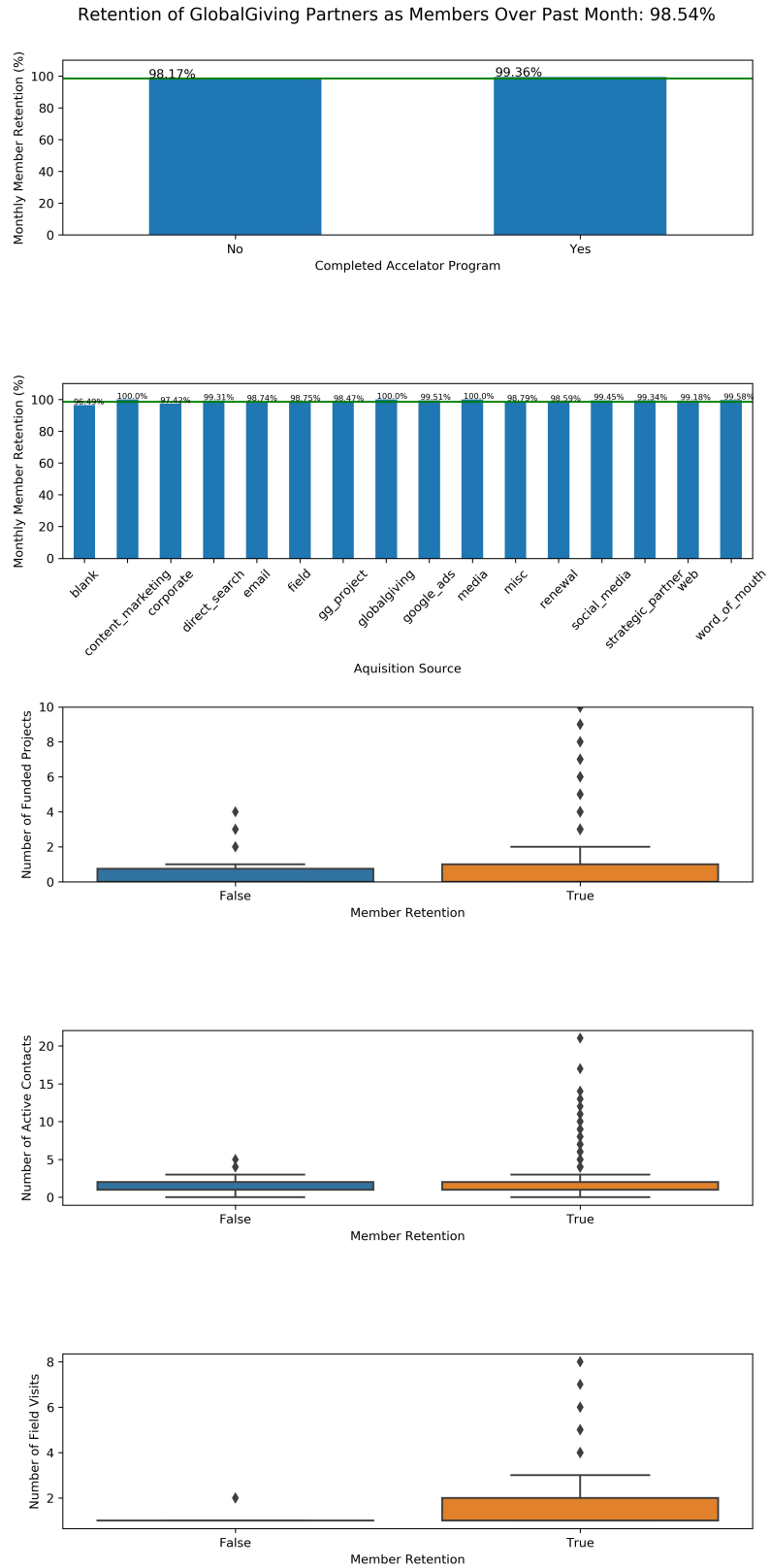


Figure 1. Draft summary of GlobalGiving partner retention of active members over the past month, as of September 17, 2020.

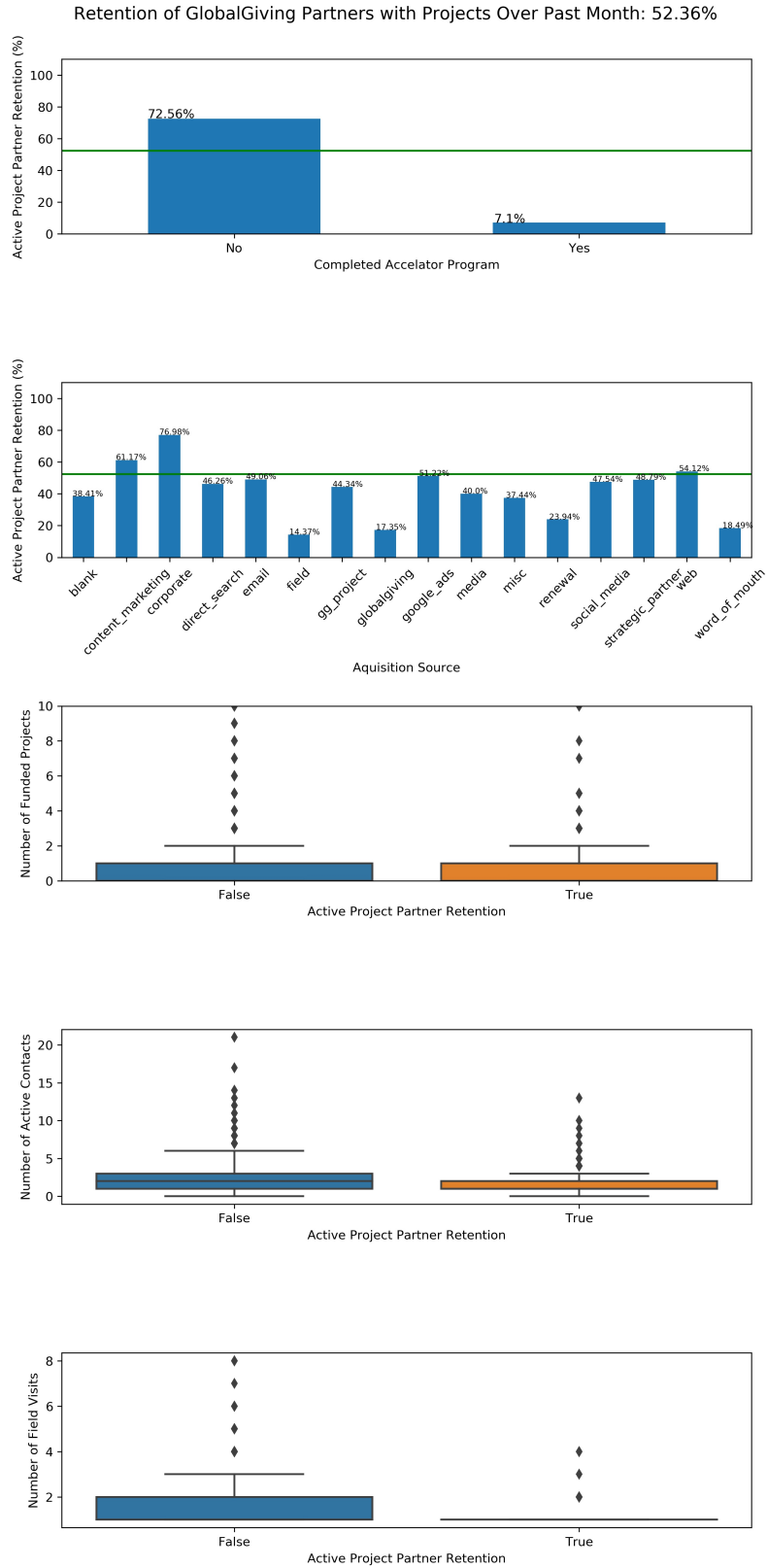


Figure 2. Draft summary of GlobalGiving partner retention of members with active projects over the past month, as of September 17, 2020.

Data Considerations

Several unexpected data situations were identified that would be explored in more depth with future analysis. First, there were 57 occurrences of records with duplicated organization name, and 44 occurrences of records where both organization name and country of registration were duplicated. This raised suspicion that some organizations may be accidentally accounted for twice or have some of their information split between records, so an important next step would be to discuss this with others more familiar with the data or seek out additional documentation to determine if some of the records should be removed. Second, there was one partner designated as non-active but had an active project (SOVA), while all other partners with this designation had 0 or NULL number of currently active projects recorded. Third, there were three partners designated as delinquent (Center Point Inc, The Grow Africa Foundation, Save the Whales) though their vetting expiration dates had not yet passed, which seems to contradict with the definition of delinquent. Fourth, “year_founded” values of 0 and “all_time_funds_raised” and “approx_annual_budget” values less than 0 were set to NA so these seemingly impossible values did not affect analyses. In follow up analyses, these and other data questions would be resolved through further exploration, further review of data documentation, and discussions with others familiar with the dataset to determine if corresponding records should be removed or correct before analyses.

Next Steps

There are many potential improvements to the retention metrics and summaries presented that could be made with additional time, data, and communication with the intended users.

A very important next step would be to engage potential users in conversations to gain further insight into the factors they are most interested in and to vet ideas for how to best convey that information. This would likely include several follow up conversations to be sure ideas are implemented as intended. Furthermore, conversations with and/or a questionnaire of partners and former partners may help to better understand what factors are important to incorporate in these summaries and potentially future data collection. This could include questions to understand what aspects of the community partners value most, why they have stayed within the community, what reasons they might consider for leaving the community, and their reasons for leaving the community if they have.

One major limitation of the data provided is that it was difficult to reliably assess partners that were actively engaged during specific periods in the past since the provided data only include first and last dates of events but not all dates. Additional data including all dates of partner events would allow presentation of partner retention metrics through time and improved recent retention metrics by better enabling calculation of member engagement during initial reference periods (e.g., during the month before the period of interest), which is needed in calculating retention metrics. Additional data queries providing information about engagement activities (e.g., number of projects posted, number of active projects, login occurrences) during specific periods would allow for use of these different engagement activities in retention tracking. For example, a table containing all project creation dates could be queried for the

number of projects each partner organization created during a specific periods of interest (e.g., August 18 to September 17, 2020) and during an initial reference period (e.g., July 18 to August 17, 2020) to identify partner organizations actively engaged during and at the beginning of the period of interest, to be used in calculating retention of project posting partners during the period. Similar queries for earlier periods would the allow for calculating changes in retention over time. Tracking of these metrics through time and presentation of that as part of summary report would also allow for additional insights into how changes in different factors may differently impact retention metrics by month, season, or year. These and other data available through the GlobalGiving API could be used to further understand factors impacting partner retention.