



# New Donor Acquisition Analysis 2022

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# Presentation Overview



Business Background



Analysis Scope



Challenge Statement and Estimated Impact (descriptive)



In-depth Insights (predictive)

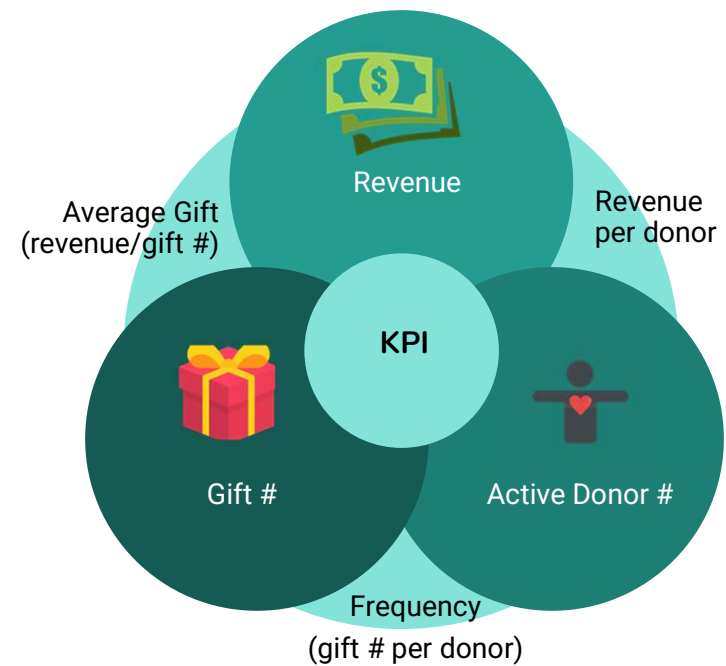


Case Studies and Actions (prescriptive)

# Business Background



## 3 key KPIs



# Analysis Scope



# Donor Analysis

★ Donors are essential to the success of the programs.



We inspect and analyze donors from multiple dimensions.



# Multi-dimensional Donor Analysis

1

## By recurrence

- New Donor
- Existing Donors
  - 2<sup>nd</sup> year
  - Key Multiyear
  - Reactivated 2<sup>nd</sup> Year
- Lapsed Donors
  - 13-24 Mo. Lapsed
  - 25+ Mo. Lapsed



# Multi-dimensional Donor Analysis

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2

## By gift channel

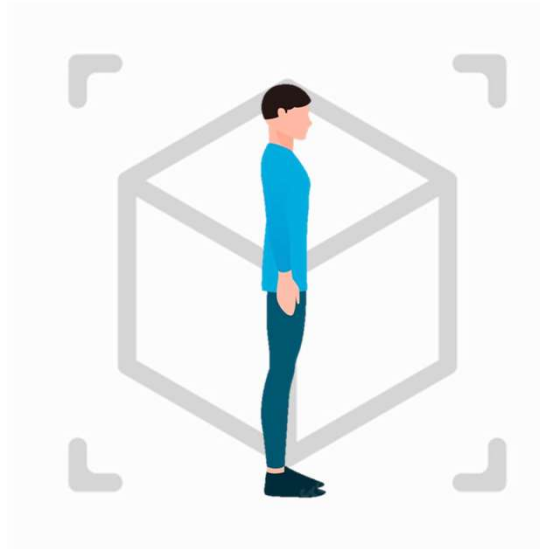
- Offline only
- Offline w Email
- Online Only
- Multichannel

# Multi-dimensional Donor Analysis

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## By gift channel

- Offline only
- Offline w Email
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3

## By contribution

- Mid-level (\$1K-\$2.5K HAC)
- Major ( $\geq$ \$2.5K HAC)
- Broadbase ( $<$ \$1K HAC)
- Non-Donor

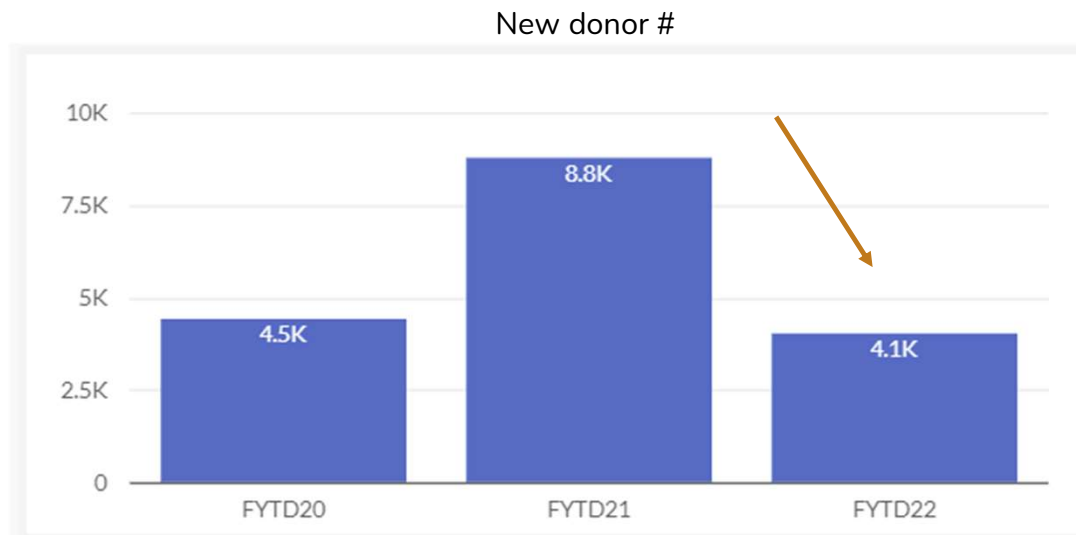


# Challenge Statement



# Challenge Statement

The most recent period (fiscal year to date 2022) is seeing a **decrease** in new donor acquisition.



New donor number in 2022 drop by

↓ 4763

↓ 54%

Compared to the same period last year (2021).

\* time period compared among the years are July - April

Unless specified, all year-to-year comparisons in this presentation is YTD.



# Impact from New Donor Drop

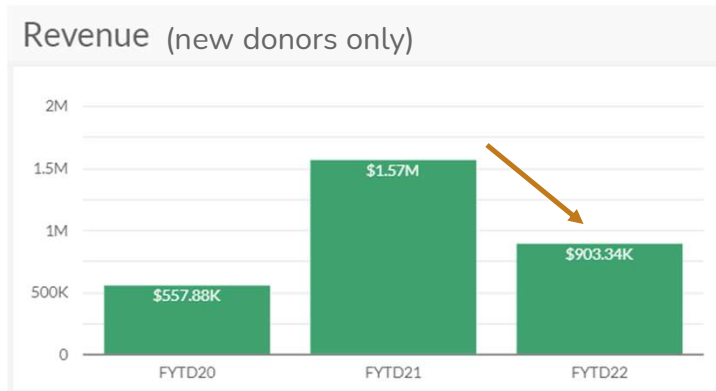
In 2021, new donors contributed a total of:

**\$1.98M**

which is

**30%**

of the entire year revenue (\$6.54M).



New donor number drop has caused a decrease of revenue in 2022 from new donor section by:

**↓ \$ 668k (43%)**

Compared to the same period\* last year (2021).

New donor contribution is

**16%**

of the 2022 YTD revenue.

1. New donors play an important role in revenue generation.
2. A reduction in new donors number in 2022 has caused a significant impact to the YTD revenue.

\* time period compared among the years are July - April

## Impact Prediction: Full Fiscal Year and Next Year

2022 YTD new donor  
revenue gap (10 months):

**\$ 668k**

2022 full fiscal year new donor  
revenue gap (12 months):

**~\$800k**

2023 revenue loss due to 2022  
new donor decline:

**~\$640k**

The reduction of the new donor acquisition in the current year  
will keep on influencing the following years.

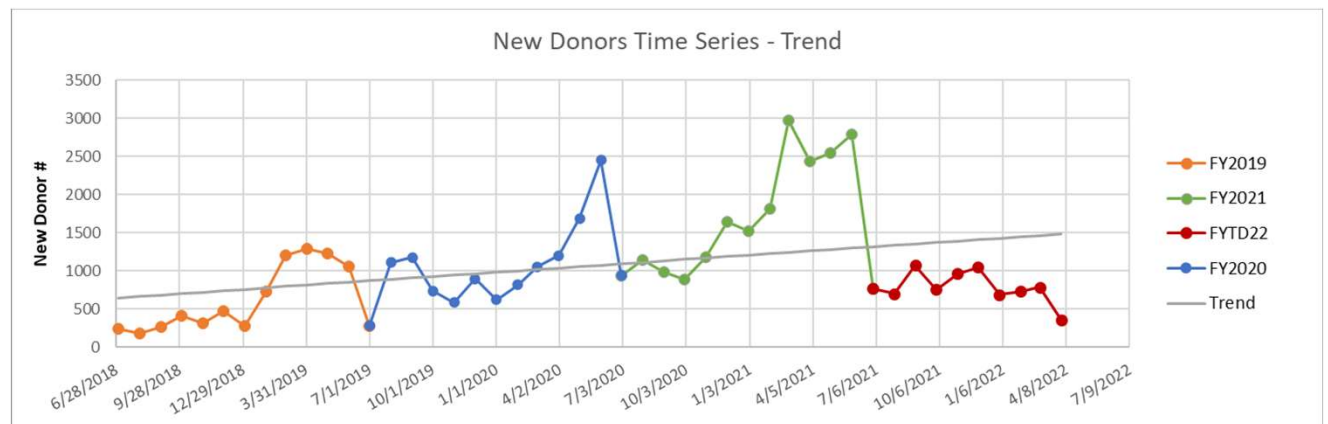
\* see appendix for calculation

# In-depth Insights

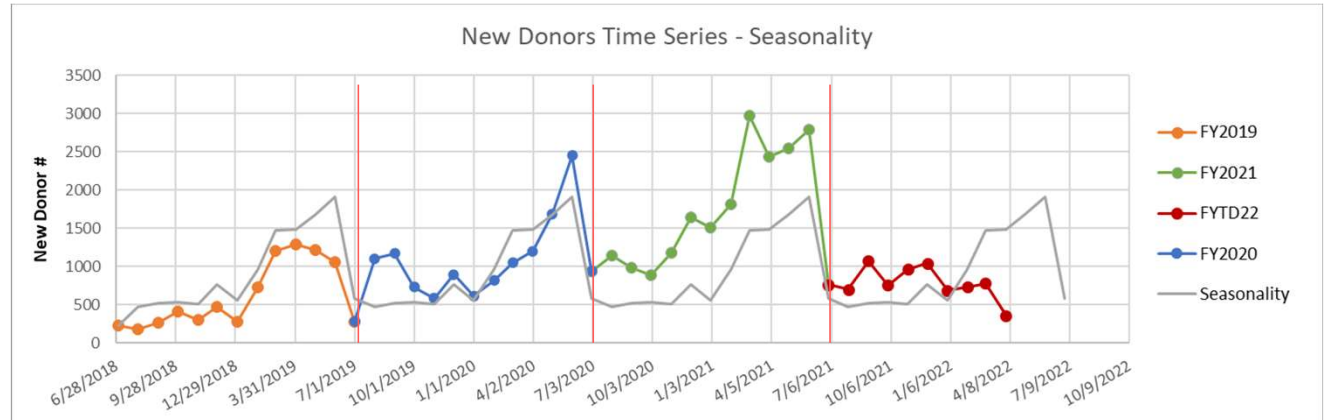
- **When** did this trend begin?
- **What** channels and subchannels are decreasing?
- **Why** is this segment down?

# New Donors by Time - Trend and Seasonality

Trend

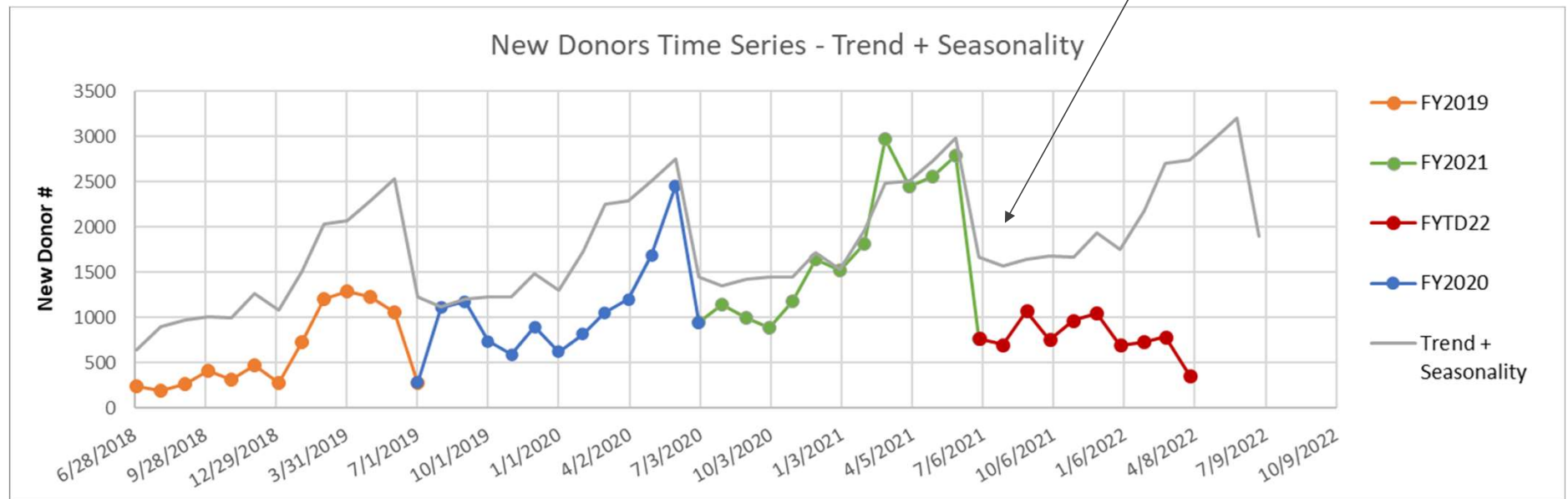


Seasonality



# New Donors by Time - Predicted vs. Reality

The discrepancy between the predicted and reality seem to begin on **7/1/2021**.





# Gift Channels and Subchannels

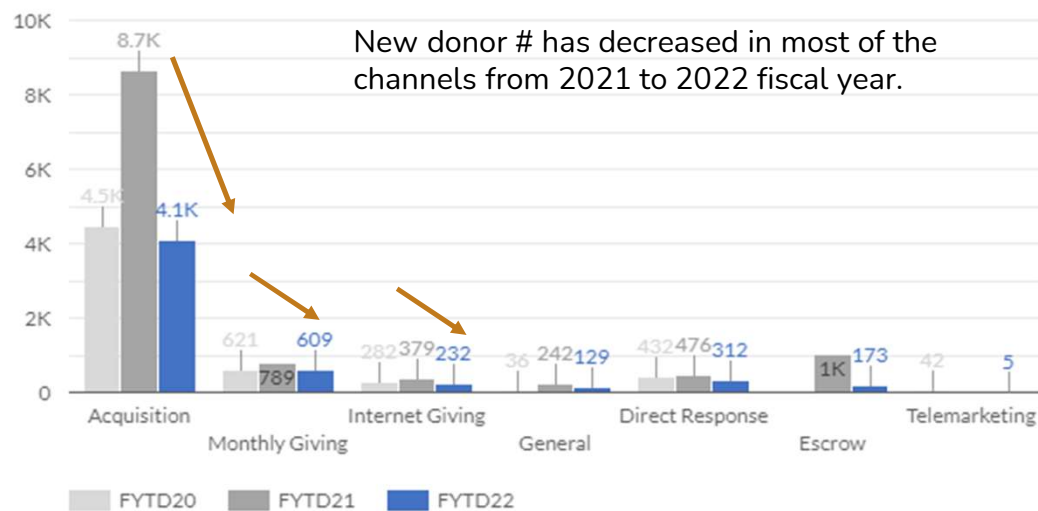
<b>Acquisition</b> Acquisition - Direct Mail Acquisition - Digital Acquisition - Telemarketing unknown	<b>Monthly Giving</b> Caring Partners Caring Partner Check Writers	<b>Internet Giving</b> Digital Appeals & Newsletters eBooks & Petitions unknown	<b>General</b> General Unrestricted General General Restricted
<b>Direct Response</b> Direct Mail Acknowledgements	<b>Escrow</b> Escrow Direct Response Escrow Acquisition Direct Mail Acknowledgements Escrow Acquisition	<b>Telemarketing</b> Telemarketing	

Gifts can be acquired through 7 channels, and numerous subchannels.



# New Donors by Channel - Dropping

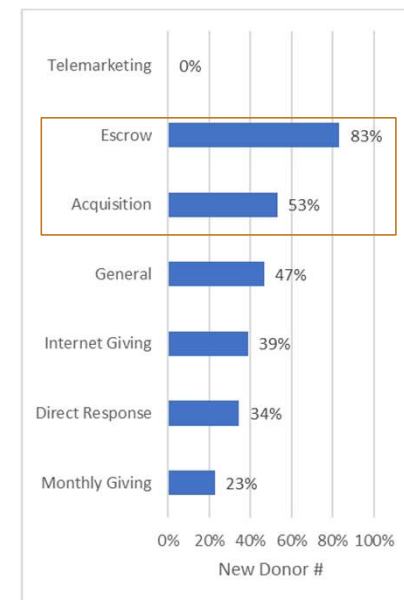
Donors by Channel/Subchannel\*



Top dropping channel by new donor #:



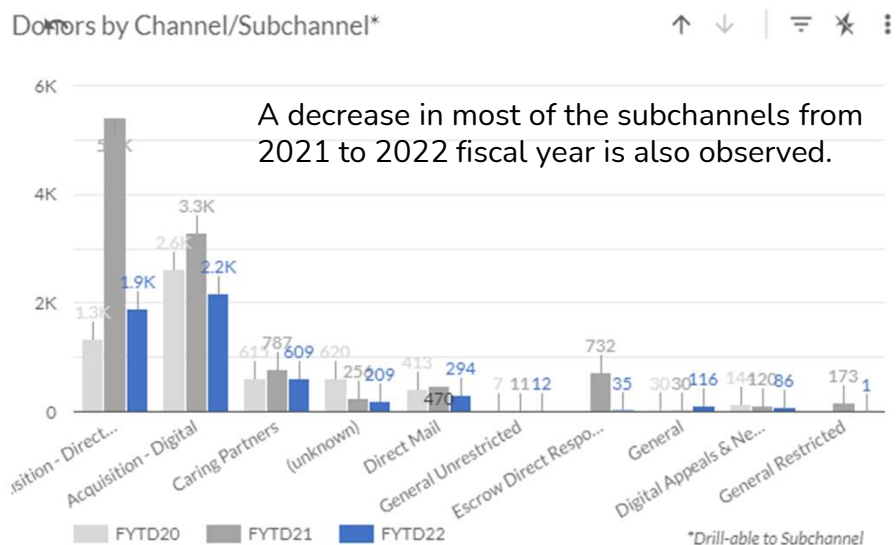
Top dropping channel by %:



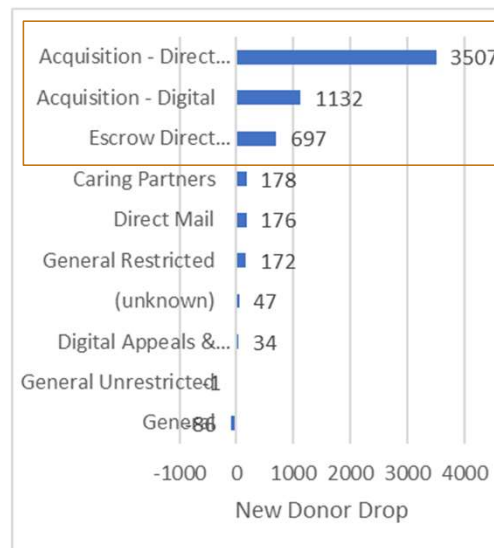
**Acquisition** channel and **Escrow** channel are the most significantly dropped channels. They combined contribute to **90%** of new donor decline.



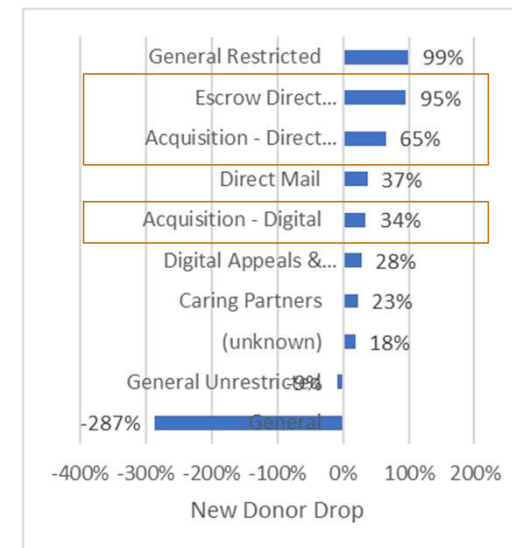
# New Donors by Subchannel - Dropping



Top dropping channel  
by **new donor #**:

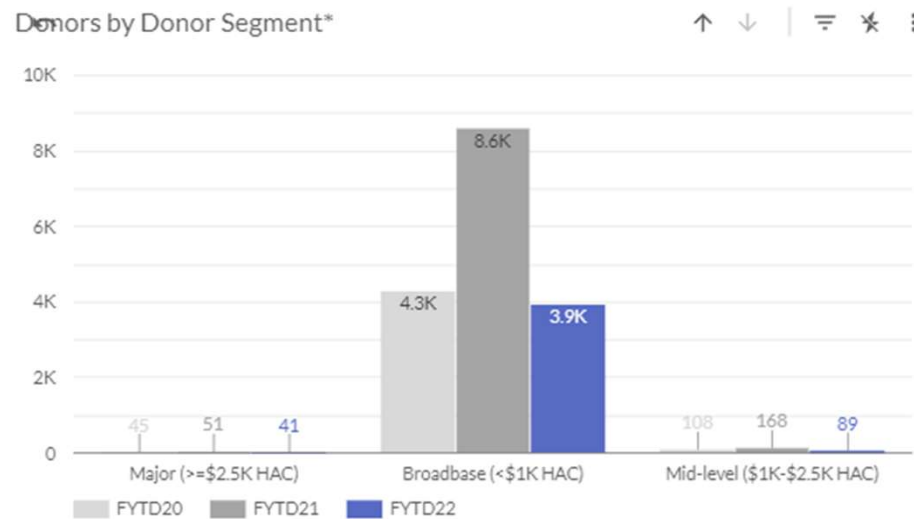


Top dropping channel by %:



**Acquisition - Direct Mail, Acquisition - Digital, and Escrow Direct Response** are top 3 subchannels that dropped significantly. They combined contribute to **91%** of new donor decline.

# Donors by Contribution



The newly acquired donors are mostly **Broadbase (<\$1k HAC)**.

# Campaign Effectiveness

New Donor #

Campaigns	FYTD20	FYTD21	FYTD22
BEQUEST	1	1	
FATHERHOOD			1
QBEQUEST	2	1	
QCT		22	19
QGeneral		83	
QGRANT	2		
QPDL		1	
Grand Total	5	108	20

New Donor Revenue

Campaigns	FYTD20	FYTD21	FYTD22
BEQUEST	\$7,936	\$36,000	
FATHERHOOD			\$10,000
QBEQUEST	\$40,555	\$17,500.00	
QCT		\$196,215.00	\$136,881
QGeneral		\$433,379.00	
QGRANT	\$12,000		
QPDL		\$15,000	
Grand Total	\$60,491	\$698,094	\$146,881

Restarting the QGeneral campaign might not increase the number of new donors significantly, but should increase revenue contribution by new donors greatly.

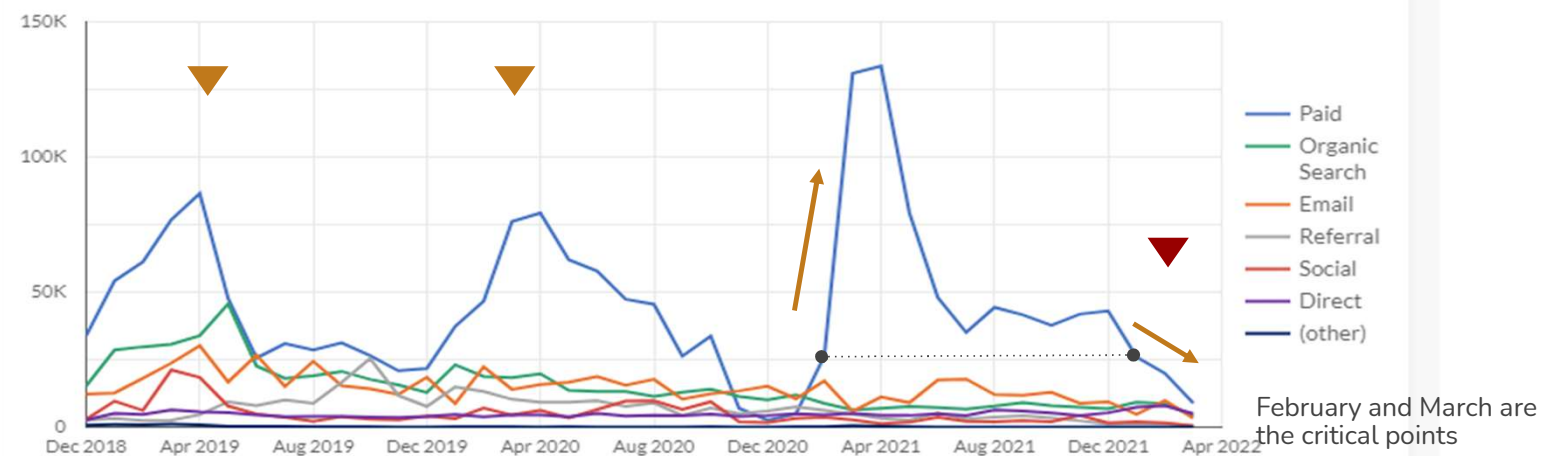
# Case Studies and Proposed Actions

Improve web channels to acquire more new donors.

# Case Study: Webpage Sessions

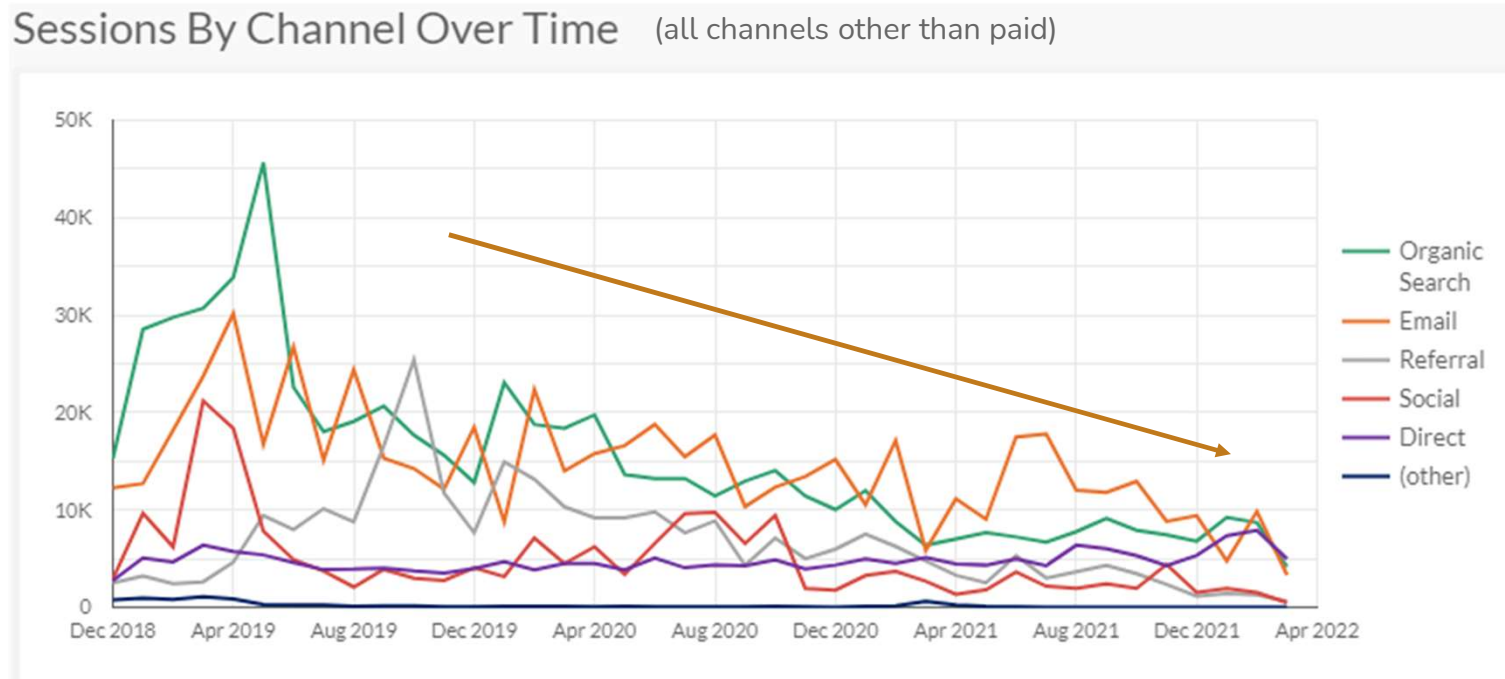
**Motivation: Acquisition - Digital** channel contributes significantly to the new donor # decline in 2022.

Sessions By Channel Over Time



The most significant change was in paid channel.  
March usually spikes except 2022.

# Case Study: Webpage Sessions



All other channels show a downward trend throughout the years.

# Insights and Actions

- Still need to prove the **correlation** between web page sessions and new donor acquisition.
- Assuming there is a correlation between web page sessions and new donor acquisition:
  - Less web page visits might mean less new donor acquired.
- Possible causes of web session visits decline:

## Non-controllable (politics, economy)

- return from the pandemic
- Inflation
- Rise of Prices
- All lead to less

## Controllable

- Investment in paid channels
- The campaign strategy is getting out of date



# Conclusions:

- The most recent period (fiscal year to date 2022) is seeing a **decrease** in new donor acquisition.
- This decrease is expected to have **multi-year** negative impact to revenue
- The decrease is estimated to start ~**7/1/2021**
- The decrease is most significantly shown in **Acquisition** and **Escrow channels**
- **QGeneral campaign** can help bring up revenue from new donors significantly
- **Web traffic** is studied to explain the new donor acquisition decline
- More investment or an improved campaign strategy should be considered to improve web page traffic

**Thank you for your  
attention!**

**Questions?**

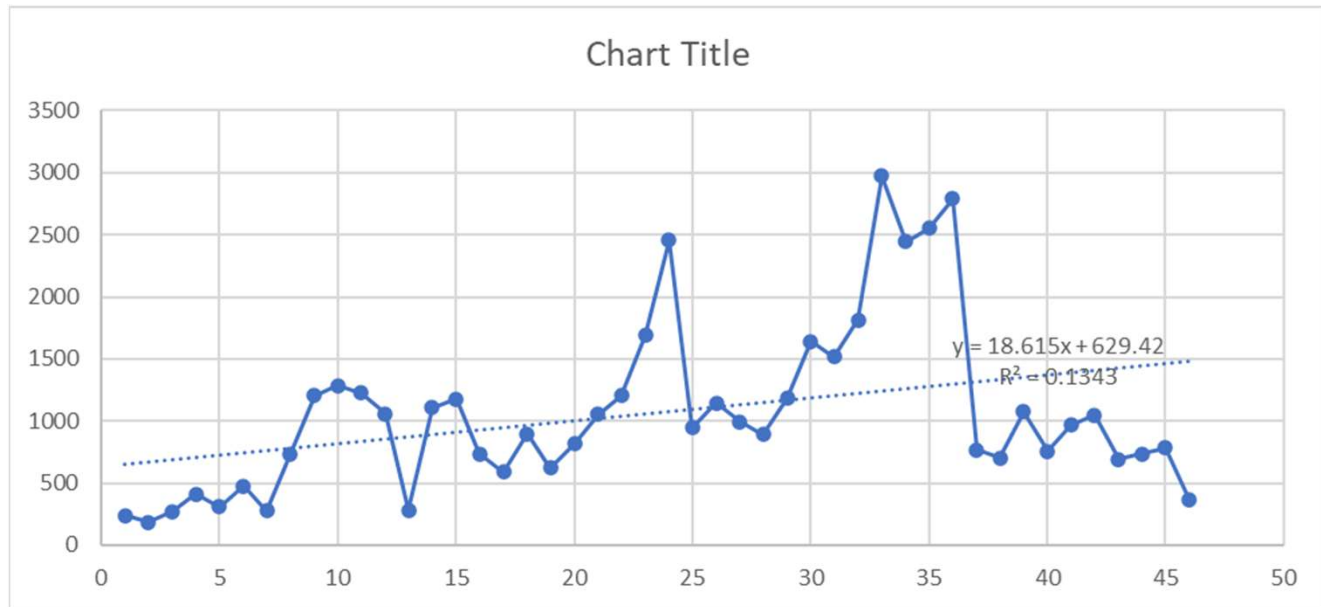
# Appendix

# Impact Prediction Calculation

- Revenue generated from new donors in 2020: \$787,094.00
- Revenue generated from 2nd year donors in 2021: \$679,623
- New donor retention:  $679623/787094 = 86.3\%$  (full year)
  
- Revenue generated from new donors in 2021: \$1,571,221.00
- Revenue generated from 2nd year donors in 2022: \$1,195,679
- New donor retention:  $1195679/1571221 = 76.1\%$  (YTD)
  
- Average of 86.3% and 76.1% = 81.2% ~80%
- 800k (estimated 2022 new donor gap) \* 80% = 640k

# New Donor Acquisition Trend

Calculation performed in Microsoft Excel



# New Donor Acquisition Seasonality

Calculation performed in Microsoft Excel

SUM																									
=C3/C2																									
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	Month	Time Peri	Active Doi	Year	Date		Seasonality		Month	Time Peri	Active Doi	Year	Date			Month	Time Peri	Active Doi	Year	Date			Average change	Mr	
2		7 FY2019	237	2018	7/1/2018		237.00		7 FY2020	280	2019	7/1/2019				7 FY2021	943	2020	7/1/2020						
3		8 FY2019	187	2018	8/1/2018	=C3/C2	470.79		8 FY2020	1108	2019	8/1/2019	3.96			8 FY2021	1144	2020	8/1/2020			1.21	1.99		
4		9 FY2019	269	2018	9/1/2018	1.44	528.38		9 FY2020	1176	2019	9/1/2019	1.06			9 FY2021	992	2020	9/1/2020			0.87	1.12		
5		10 FY2019	410	2018	10/1/2018	1.52	537.02		10 FY2020	737	2019	10/1/2019	0.63			10 FY2021	891	2020	10/1/2020			0.90	1.02		
6		11 FY2019	310	2018	11/1/2018	0.76	516.48		11 FY2020	589	2019	11/1/2019	0.80			11 FY2021	1185	2020	11/1/2020			1.33	0.96		
7		12 FY2019	474	2018	12/1/2018	1.53	763.39		12 FY2020	896	2019	12/1/2019	1.52			12 FY2021	1640	2020	12/1/2020			1.38	1.48		
8		1 FY2019	274	2019	1/1/2019	0.58	558.84		1 FY2020	621	2020	1/1/2020	0.69			1 FY2021	1517	2021	1/1/2021			0.93	0.73		
9		2 FY2019	734	2019	2/1/2019	2.68	966.84		2 FY2020	817	2020	2/1/2020	1.32			2 FY2021	1814	2021	2/1/2021			1.20	1.73		
10		3 FY2019	1205	2019	3/1/2019	1.64	1473.39		3 FY2020	1054	2020	3/1/2020	1.29			3 FY2021	2975	2021	3/1/2021			1.64	1.52		
11		4 FY2019	1286	2019	4/1/2019	1.07	1488.01		4 FY2020	1203	2020	4/1/2020	1.14			4 FY2021	2443	2021	4/1/2021			0.82	1.01		
12		5 FY2019	1224	2019	5/1/2019	0.95	1688.05		5 FY2020	1692	2020	5/1/2020	1.41			5 FY2021	2553	2021	5/1/2021			1.05	1.13		
13		6 FY2019	1059	2019	6/1/2019	0.87	1918.83		6 FY2020	2455	2020	6/1/2020	1.45			6 FY2021	2793	2021	6/1/2021			1.09	1.14		
14		7 FY2020	280	2019	7/1/2019	0.26	590.44		7 FY2021	943	2020	7/1/2020	0.38			7 FYTD22	767	2021	7/1/2021			0.27	0.31		
15																									

SUM																									
=AVERAGE(F3,N3,U3)																									
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W			
Month	Time Peri	Active Doi	Year	Date	change rat	Seasonality		Month	Time Peri	Active Doi	Year	Date	change ratio		Month	Time Peri	Active Doi	Year	Date	change rat	Average change	M			
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# Channel Drop Calculation using Excel pivot table

