

dp donorperfect

COMMUNITY CONFERENCE **SPARK**





Hello, my name is Donna Mitchell

“Do the best you can until you know better. Then when you know better, do better.” ~Maya Angelou

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Spark Informed Exchanges Using Donor Data and Insights

Make informed decisions to drive more meaningful interactions





What's In It For You?

Identify donor segments: Easily find and reactivate lapsed donors and communicate with personalized messages, letters and/or emails that resonate with their interests and giving trends.

Monitor and Evaluate: DonorPerfect's filters and reports help you easily monitor the effectiveness of your communication and cultivation strategies, such as donor retention rates, response rates, and donation levels to determine the next steps in the donor journey.





AGENDA

- ★ The Goal
- ★ Target Donor Segments
 - Fields
 - Filters
- ★ Use DonorPerfect's Reports
 - Standard Reports
 - Easy Reports
- ★ Personalize Communications
 - Mail merge letters
 - Constant Contact email templates





The Goal





Leveraging data insights to drive meaningful interactions with donors and stakeholders



What is Your Goal?



- ★ Start a Monthly Giving Program
- ★ Upgrade Mid-level or Major Donors
- ★ **Reactivate Lapsed Donors**

 LAPSED	Gloria Sandstone ID 444	 Major Donor  Monthly Donor  Volunteer	\$10 Recent gift on 1/23/2023
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My lapsed donors are those whose last gift was between 1 and 3 years ago. Yours may be the last 18 months or the last 5 years.

Your Current Situation - Lapsed Donors

- ★ Find and re-engage existing donors
- ★ Understand their giving trends
- ★ Personalize communications
- ★ Monitor your cultivation success





The Result: Customized Reports

Donor ID	First Name	Last Name	Last Gift Date	Last Gift Amount	Last Solicitation	Email (EMAIL)	Address	City	
487	Danny	Aston	11/01/2021	\$350.00	Website Donation Form		321 main	San Diego	CA
237	Mikki	Aubrey	07/03/2021	\$150.00	Summer Mailing 2021		568 Kingsley Street	San Diego	CA
232	Michele	Aubrum	07/03/2021	\$75.00	Summer Mailing 2021		432 Birch Circle	San Diego	CA
244	Justin	Aucklandman	07/03/2021	\$75.00	Summer Mailing 2021		349 Oak Drive	Salt Lake City	UT
190	Kevin	Bacon	07/03/2021	\$75.00	Summer Mailing 2021		12490 Hollywood Blvd.	Hollywood	CA
145	Jim	Barkley	07/23/2021	\$75.00	Summer Mailing 2021		59 Brown Avenue	Philadelphia	PA
282	Rodney	Barrett	07/23/2021	\$75.00	Summer Mailing 2021		34 Ash Lane	Salt Lake City	UT
173	Joyce	Bartholemew	07/23/2021	\$75.00	Summer Mailing 2021		60 Blue Street	Philadelphia	PA
191	Kevin	Bason	07/23/2021	\$500.00	Summer Mailing 2021		12490 Hollywood Blvd.	Hollywood	CA
122	Jake	Beausay	07/23/2021	\$75.00	Summer Mailing 2021		132 Welsh Rd	Horsham	PA
163	Jonathan	Beaver	07/23/2021	\$75.00	Summer Mailing 2021		34 Pine Street	Salt Lake City	UT
490	Brooke	Blaine	07/22/2021	\$300.00	Website Donation Form		742 Evergreen Terr	Springfield	IL





The Target

Use filters and existing fields to target your donor segments



Your Target

- ★ Large number of lapsed donors
- ★ When did they last give and how much?
What appeal did they donate to?
- ★ Use DonorPerfect fields to include in
personalized communications
- ★ Reactivate Lapsed Donors





System-Calculated Fields

Tip: You can create your own Calculated Fields for specific gift totals

Giving & Engagement Profile

Fiscal Year-to-date	25.00	Calendar Year-to-Date	25.00	Lifetime Gift Total	25.00
Last Year YTD	0.00	Last Calendar Year CYTD	0.00	Number of Gifts	1
2 Years Ago CYTD	0.00	2 Years Ago YTD	0.00	Number of Years Donated	1
3 Years Ago YTD	0.00	3 Years Ago CYTD	0.00	Average Gift Amount	25.00
4 Years Ago YTD	0.00	4 Years Ago CYTD	0.00	Max Gift Amount	25.00
5 Years Ago YTD	0.00	5 Years Ago CYTD	0.00	Maximum Gift Date	04/11/2024
6 Years Ago YTD	0.00	6 Years Ago CYTD	0.00	Initial Gift Amount	0.00
Last Gift Date	04/11/2024	Last Gift Amount	25.00	Initial Gift Date	04/11/2024
Last GL Code	Annual Fund	Last Solicitation	Annual Appeal 2024	Last Contact Activity	
Personal Engagement Count	0	Most Frequent Solicitation Description	Annual Appeal 2024	Most Frequent Solicitation Code	AA24





DonorPerfect Fields and Filters

DonorPerfect System Calculated Fields

- ★ Last Gift Date (LAST_CONTRIB_DATE)
- ★ Last Gift Amount (LAST_CONTRIB_AMT)

DonorPerfect Filters

- ★ Last Gift Date between 01/01/2020 and 12/31/2022

The Reason They Gave

- ★ Last Solicitation Code

Filter Criteria (SQL)

DP.DONOR_TYPE = 'IN'

DP.LAST_CONTRIB_DATE BETWEEN '01/01/2020' AND '12/31/2022'

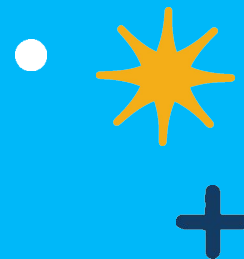
DP.LAST_CONTRIB_AMT > 0

Combine criteria with ☒ AND ☐ OR

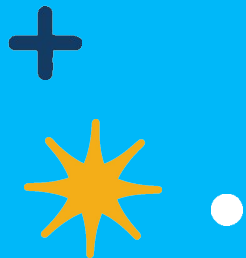
Save Filter As

Tip: Consider other criteria such as, Donor Type = Individual, Email is Not Null, Email is Null to determine whether they get an email or a letter





Let's Build a Filter





Lapsed Donor Information

Create reports to see more information about your targeted donors



Lapsed Donors Reports

★ Some Year But Not This Year

★ Constituent Summary

★ Export to File

★ Easy Report Builder

★ Displays last gift date and amount for lapsed donors

★ Lists constituent contact information, the amount and date of their most recent gift, and cumulative giving totals

★ Customizable report that exports as a .csv (Comma Separated Values) file

★ Customized, formatted or .csv report



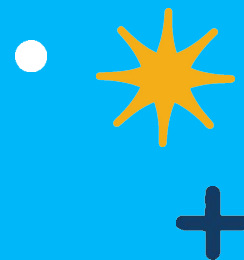
DonorPerfect Reports

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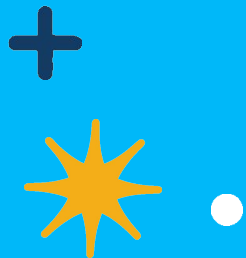
Donor ID	First Name	Last Name	Last Gift Date	Last Gift Amount	Last Solicitation	Email (EMAIL)	Address	City
168	Joseph	Bagadonuts	07/03/2021	\$750.00	Summer Mailing 2021	jbagadonuts@anyemail.com	654 W. Markley Ave	Norristown
303	Shirley	Caesar	04/14/2021	\$200.00	Unsolicited	Abc123@gmail.com	369 Adams Lane	Los Angeles
56	Chris	Carlin	07/09/2021	\$25.00	Summer Mailing 2021	test@gmail.com	55 1st Street	Philadelphia
117	Isabelle	Christopher	07/09/2021	\$50.00	Summer Mailing 2021	dmitch0304@gmail.com	327 Stanmore Rd	Baltimore
108	Hans	Delbrook	07/09/2021	\$7,500.00	Summer Mailing 2021	email@comcast.net	2730 36th Street SW	Wyoming

Tip: Create separate reports and filters for donors with and without and email address and use them to create your mail merge or Constant Contact email lists!





DonorPerfect Reports





Personalized Communications

Appeal to your donors' interests and communicate in a format that works for them!



Personalized Communications

Hi {SALUTATION},

Thank you for your previous support for our {LAST_SOLICIT_CODE},
on {LAST_CONTRIB_DATE} of {LAST_CONTRB_AMT}.

We are asking for your help again to support our Bridging the Gap campaign to provide technological and educational resources to our most vulnerable children and help stem the tide of generational poverty through education. Will you help us Bridge the Gap?



Hi Carl,

Thank you for your previous support for our Annual Appeal 2021 on
March 4, 2021, of \$100.00.

We are asking for your help again to support our Bridging the Gap campaign to provide technological and educational resources to our most vulnerable children and help stem the tide of generational poverty through education. Will you help us Bridge the Gap?





Monitor the Results

DonorPerfect's reports can help you monitor your success: response rates, retention, and donation levels



Gifts & Giving Trends Reports

- ★ Gifts by Date
- ★ Daily Log
- ★ Easy Reports
- ★ Comprehensive Donor Revenue Analysis
- ★ All donations that have been received during the user-defined date range
- ★ A listing of all gifts in a given date range that includes some gift codes and whether they are pledge payments
- ★ Customizable report designer
- ★ Provides a 'state of the database' analysis with 26 statistics including new donor revenue, retained donor revenue, and the attrition rate



Gifts & Giving Trends Reports

Comprehensive Donor Revenue Analysis as of 06/05/2024

		Current Year
		06/05/2024
Active Donors		
Number of Active Donors		42
Total Revenue		80,863.39
Number of Gifts		303
Revenue Per Donor (Year to Date)		1,925.32
Revenue Per Gift (Average Gift)		266.88
Gifts Per Donor		7.21
Number of 2+ givers for year		23
Retained Donors		
Number of Retained Donors		36
Donor Retention Rate		25.90%
Retained Donor Revenue		25,538.39
Revenue Retention Rate		31.58%
Revenue per Retained Donor		709.40
Average Donor Lifetime		1.35
Lifetime Donor Value		2,599.18
New Donors		
Number of New Donors		2
New Donor Revenue		50,025.00
Number of New Donor Gifts		2
Revenue per New Donor		25,012.50
Revenue per New Donor Gift		25,012.50
Gifts per New Donor		1.00
Reactivated Donors		
Reactivated Donors		4
Reactivated Donor Revenue		5,300.00
Number of Reactivated Gifts		4
Revenue per Reactivated Donor		1,325.00
Revenue per Reactivated Gift		1,325.00

Donor ID

Name

494

Leslie Constantine

Solicitation

General Ledger

Donor Appeal 2024

Annual Fund





Recap

- ★ Define your goal
- ★ Use DonorPerfect's fields and filters to target your donor segments
- ★ Use standard and customized reports
 - Get more information about your donors donation and communication preferences
 - See the results of your fundraising efforts
- ★ Create personalized communications to appeal to your donors





DonorPerfect Resources

DonorPerfect Community Knowledgebase Articles

[DonorPerfect Calculated Fields](#)[General Financial Reports](#)[Listing Reports](#)[Using the Easy Report Builder](#)[Export Templates](#)[Mail Merge](#)[Constant Contact Integration](#)[Constant Contact Field Mapping](#)

*[DonorPerfect Live Webinars and Virtual Classes](#) & [#On-Demand Webinars](#)

Filters and Reporting

#10 Finding the Data You Want 101

#11 Finding the Data You Want 102

#5 Basic Reporting 101

#12 Using DP Reports

#15 Financial Reporting in DonorPerfect

Contact Management

#13 Creating a Mailing List

*Custom Data for Donor Communication

Constant Contact

#DonorPerfect & Constant Contact

*Using DonorPerfect for an Email Campaign

***Calculated Fields** - A Way to Use Your Data

***Lapsed Donors** - Getting Them Back

***Screen Designer in DP:** Data Entry Screens Your Way

***DP Easy Report Builder**



Questions?





Thank You!