MHA Donor Profiles Project

Proposal: This project is designed to help Stewardship answer the questions: Who are our donors? Where are they coming from? What are their motivators? Investigation of donor data over past 5 years.

Outcome: Establish metric baseline which informs strategy, tells us who donors are, and what their behaviors indicate, and allows Stewardship to track and measure impact implemented with these segments over time. With limited resources, we are trying to use data to inform which audiences have the ROI and capacity, to help prioritize our work accordingly. (Ex: if Prouty is the best feeder to major gift pipeline, maybe we focus on those program needs over less impactful segments) We can't do everything for everyone at once, and we want to be tactful and strategic in our partnerships. We would hope to use this model in the future to engage with new clients and sister organizations such as APD, MAH, VNA, etc.

Timeline: In advance of FY24, if possible. Summer project? Whenever convenient.

Request: As much or as little data as possible. As helpful, Stewardship will aim to complete data analysis.

Constituent Type Buckets (Audience Segments: identify and define – can overlap)

1. Prouty Participants & Donors
2. Geisel Alumni Members (MD, MPH, Etc.)
3. Dartmouth College Alumni
   - Exclusionary: Non-Geisel
4. Residents
   - 'House-staff', AKA: affiliate orgs as a resident in practice
     - How are they coded in data?
5. Community Members
   - VT/NH locals
6. Patients
   - Does not currently exist in a usable way in our database, hold for phase 2.
7. Employees
   - Current employees
     - Former employees for phase 2
8. Board Members
   - Current board members of:
     - DHMC, Dartmouth Health, Geisel Advisory Board
9. Health Leaders Circle members / Pinnacle Society members
10. Other audiences that are frequent but that are not yet on this list?

MHA Donor Bucket Outputs

1. Total lifetime giving
   a. Include everything: soft credit, hard credit, pledges, planned gifts, etc.
2. Fiscal year total giving
   a. Broken out for each year, current FY and last 4
3. Gift Count (participation)
   a. Number of gifts per fiscal year per group
4. Gift Designations
   a. Average/majority designation of group? Is this identifiable?

        b.   If not: List of all gift designations of group in last 5 years
5. First Gift Date
        a.   Analyze acquisition rates per group
6. Consecutive Giving
        a.   Average years of consecutive giving per group
        b.   Consecutive or total years giving? Can we get both?
7. Gift date trend: When do these donors usually make gifts? Time of year? Month?
        a.   We can analyze on the back-end, if not, can we get this straight out of raisers edge?

Priority Order:

1. HOW: Gift Trends/retention
2. WHERE: interested in giving
3. WHAT: behavior indicators
4. WHEN: Giving patterns / tendencies

Data Informed Metrics for groups:

1. Retention Rate:
        a.   Giving: cumulative fiscal year giving to any fund, per FY, by group
               i.   Gave once in last five years? Gave all years? Gave last year, and this year?
2. Loyalty Rating: Quantity of members with 5-10 years of Consecutive giving
3. Growth Rate: Has funding over past 5 years for group show increase? Static? Decrease?
4. Value Rating: Lifetime Giving and Past 5 years annual giving total breakdown?

Science of Stewardship into Art of Stewardship: What 10-word mission/impact statement would communicate most efficaciously to this group?

Goals and Outcomes:

As of June 1, 2023 the Stewardship Team of MHA will work to define donor profiles for these data-informed priority audiences and behaviors below. This is the second part of a Donor Profile Data analyzation project, where we will seek to learn more specific information regarding these priority audiences and donor behaviors and use these profiles to inform tactical stewardship strategy to develop our wholistic donor experience model.

Top 5 Priority Audiences/Behaviors

1. Consecutive Donors
2. First Time Donors
3. Trustees
4. Tribute Donors
5. Dartmouth College Alumni (excluding GSM)
6. GSM
7. HLC/Pinnacle

Data Requests

1. Consecutive Donors – Past 5 years, plus FY23
        a.   Number of gifts per year

   b. Constituency, top 5 (if possible)

   c. Annual Giving broken out per FY

   d. First, Last, Largest gift and details around those (fund ID, designation, etc.)

     i. Per donor, most common designation (of past 5 years)

     ii. Per donor, most funded area of giving

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   e. Top 5 Most common designations, entire group

   f. Top 5 most Funded designations, entire group

2. First Time Donors – Past 5 years, plus FY23

   a. Number of gifts per year

   b. Constituency, top 5 (if possible)

   c. Annual Giving broken out per FY

   d. First, Last, Largest gift and details around those (fund ID, designation, etc.)

     i. Per donor, most common designation (of past 5 years)

     ii. Per donor, most funded area of giving

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   e. Top 5 Most common designations, entire group

   f. Top 5 most Funded designations, entire group

3. Tribute Donors – Past 5 years, plus FY23

   a. Number of gifts per year

   b. Constituency, top 5 (if possible)

   c. Annual Giving broken out per FY

   d. First, Last, Largest gift and details around those (fund ID, designation, etc.)

     i. Per donor, most common designation (of past 5 years)

     ii. Per donor, most funded area of giving

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   e. Top 5 Most common designations, entire group

   f. Top 5 most Funded designations, entire group

Donor Profile Template

Name: Audience

Narrative Statement: Who they are, what motivates, why they give

Data Profile:

1. Average Gift Size
2. Avg/ Number of Gifts
3. Top areas of support
4. Constituency

Metrics: [Define Goal then have data]

1. Year to Year retention (by FY)
2. 5 Year retention
3. ==Participation (if this makes sense)==
   a. ==Probably only makes sense for audiences, not behaviors==

4. Consecutive Giving %
    a. All audiences
    b. Out of behaviors, only Tribute
5. First Time Donors %
    a. All audiences
    b. Out of behaviors, only tribute

Phase 2 – MHA Donor Profiles

Additional Donor Type Buckets:

I. CHAD Event participants and donors
II. Reunion participants and donors
III. Affiliated Organizations
    a. APD, MAH, VNA, NLH, Cheshire, etc.

Expanded Exports:

1. Crossover for giving, do these groups give back to themselves, or other areas?
    a. Ex: Prouty donor are linked to Cancer, but maybe also CHAD?
2. HOW they made their gifts
    i. Online or Direct Mail? Phone?
    ii. Is data attribute available?
    iii. Pay method?
3. Velocity: First gift date to Largest gift date,
    a. Pipeline Timeline: how long to grow donor from start to largest gift?