

# Beyond the Gift – From Year-End Donors to Loyal Supporters: The Power of Donor Retention

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NONPROFIT SUPPORT PROGRAM | HARTFORD FOUNDATION FOR PUBLIC GIVING

PRESENTED BY SHARI PINSKY ADAMS

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# Welcome & Introductions

## Poll 1: What's your role?

- a) Board Member
- b) Executive Director/CEO
- c) Development Director
- d) Other Development Staff
- e) Other (Please type in chat)

# What We Will Learn Today –

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- ❖ What donor retention is
- ❖ Why donor retention matters
- ❖ Practical strategies for retaining both repeat and first-time donors
- ❖ Ways board and staff help strengthen donor relationships

# Housekeeping



- ❖ Ask questions at anytime using chat
- ❖ Keep your camera on
- ❖ Mute except when speaking

# The Year-End Opportunity

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- ❖ 30% of all annual giving happens in December
- ❖ 10% of all giving happens in the last 3 days of the calendar year
- ❖ Many first-time donors give in December, but most never give again



What's your plan for staying in touch with your current and new donors after December 31<sup>st</sup>?



# What is Donor Retention?

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A measure of how many donors continue to donate to your organization

**Donor Retention Rate**



**RETURNING DONORS**  
in Year #2

— — — — **DIVIDED BY** — — — —

**ALL DONORS**  
in Year #1





$$\frac{200}{400} \times 100 = 50\%$$

**Donor Retention Rate**

# The Current State of Donor Retention

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Poll 2:  
Do you track  
donor retention?

- a) Yes, we track it consistently and use the data to improve.
- b) Somewhat, we check retention occasionally.
- c) Not yet, it's on our radar.
- d) No, we don't currently track donor retention.

# Why Donor Retention Matters: Reason #1

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It costs far less to  
keep a donor than to  
find a new one.



# Why Donor Retention Matters: Reason #2

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Improving Donor  
Retention by Just 10% Can  
Double the Lifetime Value  
of your Donor Database!

— *Adrian Sargeant*

# Donor retention math »

**Original Retention Rate: 41%** **Improved Retention Rate: 51%**

Year	Donors	Avg. Gift*	Total	Year	Donors	Avg. Gift*	Total
Start	5,000	\$ 200.00		Start	5,000	\$ 200.00	
2	2,050	\$ 220.00	\$ 451,000	2	2,550	\$ 220.00	\$ 561,000
3	841	\$ 242.00	\$ 203,401	3	1,301	\$ 242.00	\$ 314,721
4	345	\$ 266.20	\$ 91,734	4	663	\$ 266.20	\$ 176,558
5	141	\$ 292.82	\$ 41,372	5	338	\$ 292.82	\$ 99,049
6	58	\$ 322.10	\$ 18,659	6	173	\$ 322.10	\$ 55,567
7	24	\$ 354.31	\$ 8,415	7	88	\$ 354.31	\$ 31,173
8	10	\$ 389.74	\$ 3,795	8	45	\$ 389.74	\$ 17,488
9	4	\$ 428.72	\$ 1,712	9	23	\$ 428.72	\$ 9,811
10	2	\$ 471.59	\$ 772	10	12	\$ 471.59	\$ 5,504
11	—	—	—	11	6	\$ 518.75	\$ 3,088
12	—	—	—	12	3	\$ 570.62	\$ 1,732
13	—	—	—	13	2	\$ 627.69	\$ 972
14	—	—	—	14	1	\$ 690.45	\$ 545

Grand Total from Original Donors: **\$ 820,859**

Grand Total from Original Donors: **\$ 1,277,208**

**Total Savings: \$ 456,349**

# Why Donor Retention Matters: Reason #3

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Loyal donors become ambassadors,  
bringing in new supporters.



# Understanding Why Donors Leave and Why They Choose To Stay

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Can you think of an organization you once supported but no longer do?

What led you to stop giving?



# Why Donors Leave

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- ❖ 5% – Thought charity did not need them
- ❖ 8% – No info on how monies were used
- ❖ 9% – No memory of supporting
- ❖ 13% – Never got thanked for donating
- ❖ 16% – Death
- ❖ 18% – Poor service or communication
- ❖ 36% – Others more deserving
- ❖ 54% – Could no longer afford



-“Managing Donor Defection” by Adrian Sargeant

Now think about an organization that you  
continue to support.

What keeps you giving year after year?

# What Keeps Donors Coming Back

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- ❖ Donor perceives organization to be effective
- ❖ Donor knows what to expect with each interaction
- ❖ Donor receives a timely thank you
- ❖ Donor receives opportunities to make views known
- ❖ Donor feels like they're part of an important cause
- ❖ Donor feels his or her involvement is appreciated
- ❖ Donor receives info showing who is being helped



# Proven Donor Retention Strategies For Year-End Donors

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...AND DONORS ANYTIME!

# Donor Retention Strategy #1: Thank Your Donors

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## Prompt Personalized Thank You



Dear John,

Thank you for your most generous gift of \$500 received on December 2, 2025. I am also deeply grateful for the many other ways you continue to be there for the people we serve at ABC Inc. **As a dedicated board member and advocate for our mission**, your commitment truly goes above and beyond. You do not just support this work; you are a part of it.

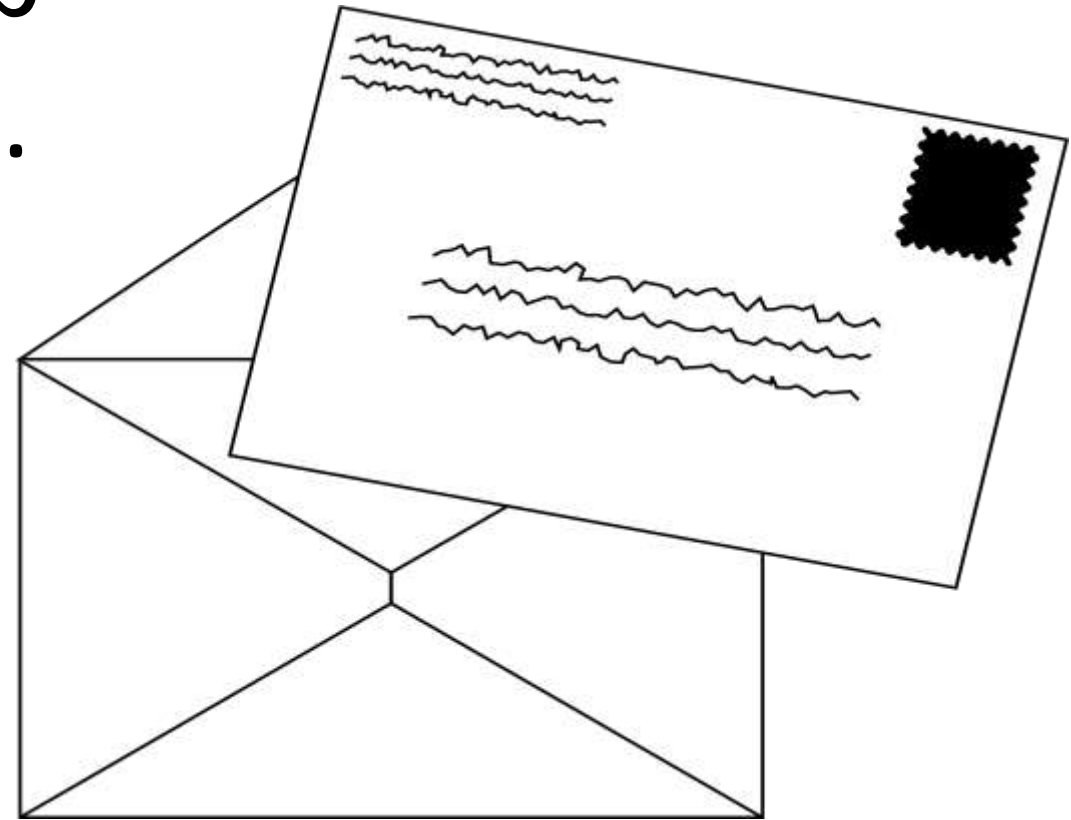
Because of you, people experiencing homelessness who are facing some of the most difficult moments of their lives will find more than just a roof over their heads. They will find recovery support, job training, someone to believe in them, and the chance to rebuild. That kind of transformation does not happen without people like you in our corner, people **who give not only their resources, but also their time**.

**Your long-time partnership** with ABC, Inc. is creating a stronger, more compassionate community. I am honored to have you with us on this journey.

With deepest gratitude,

- ❖ I know who the donor is
- ❖ I know they give more than just \$
- ❖ I know they're a long-time supporter
- ❖ I use donor-centered language – more YOU than we/us

The acknowledgement letter is only the first step in the thank you process.





Donors can be thanked through different channels:

- ❖ Phone Calls
- ❖ Mail – Especially Handwritten Notes
- ❖ Email
- ❖ Text
- ❖ Video

Donors can be thanked multiple times by multiple people:

- ❖ Executive
- ❖ Development Director
- ❖ Program Staff
- ❖ Beneficiaries
- ❖ Board Members



# Did You Know...

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- ❖ Thank you call from a board member within 24 hours increases giving by 39%
- ❖ 70% of donors receiving a thank you call from a board member were retained 2 years later

Source: Donor Centered Fundraising, Penelope Burke, Cygnus Research

Poll 3:  
Do board  
members at your  
organization  
participate in  
thanking donors...

- a) By phone
- b) By handwritten thank you notes
- c) By email
- d) By text
- e) By thank you video
- f) Not at all

# Two Simple Strategies to Implement

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- 1) Allocate time at the end of each board meeting for board members to write thank you cards
- 2) Organize a designated team of board members to make thank you calls



# Donor Retention Strategy #2: Segment Year-End Donors

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Donor segmentation:

- ❖ Is the process of separating your nonprofit supporters into groups based on common qualities and characteristics they share.
- ❖ It creates more personalized conversations and communications between your organization and your supporters.

# Step 1: Who Are Your Year-End Donors?

## A Few Common Segments

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- ❖ **Recency:** How long have they been giving?
- ❖ **Frequency:** How often do donors give?
- ❖ **Type:** How are donors giving?
- ❖ **Amount:** How much are donors giving?
- ❖ **Reason:** Why do donors give?

# Step 2: Develop Message Themes and Templates for Each Segment

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## LONGTIME SUPPORTER

Subject: You're at the Heart of ABC, Inc.

Dear Jane,

For 10 years, your generosity has been at the heart of ABC, Inc. This Valentine's Day, we just want to say how much you mean to us.

Because of you, children and teens have found caring mentors, steady guidance, and the confidence to believe in themselves. You have stood by them through every season, and we are deeply grateful.

Thank you for being a part of our family of supporters and for sharing your heart with young people who need it most, year after year.

With heartfelt appreciation,

## FIRST-TIME DONOR

Subject: You've made our hearts full

Dear Tom,

This Valentine's Day we are celebrating the kindness that fills ABC, Inc. and that includes you.

Your first gift is already making a difference for the children and teens. Because of you, young people are finding trusted mentors, encouragement, and the confidence to believe in themselves.

We're so grateful that you've chosen to join our ABC family and become part of this life-changing journey. We can't wait to share more of the incredible impact your caring heart makes.

With heartfelt appreciation,

# Step 3: Map Out A Tailored Cycle Of Touches for Each Segment

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## LONGTIME SUPPORTER

- ❖ An acknowledgement letter after the donation
- ❖ A phone call from the Executive thanking for longtime support
- ❖ A handwritten thank you note
- ❖ A monthly newsletter
- ❖ A letter celebrating 10-year anniversary with token gift

## FIRST-TIME DONOR

- ❖ An acknowledgement letter after the donation
- ❖ A phone call from a board member to explain the impact of the donation directly to the supporter
- ❖ A handwritten thank you note
- ❖ A monthly newsletter
- ❖ An invitation to take a tour within six weeks



# A Bonus Tip:

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Pay Special Attention to First Time Donors to  
Turn Them Into Repeat Givers

# New Donor Welcome Package

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What to include:

- ❖ A Thank you letter w/ handwritten signature and handwritten note – from Executive
- ❖ Handwritten thank you note - from Development Director
- ❖ Most recent newsletter/Impact Story
- ❖ Brochure
- ❖ Business card/Contact Info

## New Donor Cultivation Timeline (First 90 Days)



Poll 4:  
What's your  
current first-time  
donor retention  
rate?

- a) Over 50%
- b) 24% – 50%
- c) Under 23%
- d) We don't track it, but we will 😎

# Set Your Organization Up for New Donor Retention Success

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- ❖ Acknowledge quickly
- ❖ Show Impact
- ❖ Deepen relationship
- ❖ Ask for second gift
- ❖ Every step builds connection, trust and momentum
- ❖ The more timely and personal your actions, the greater the chance of long-term support
- ❖ Track your first-time donor retention rate!

# Donor Retention Strategy #3: Implement a Meaningful Annual Donor Communication Cycle

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- ❖ Report on Outcomes
- ❖ Share impact stories
- ❖ Use donor centric content
- ❖ Solicit donor feedback

# Impact Reporting: An Example

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# Impact Reporting: An Example

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# 4 Ways Board & Staff Can Strengthen Donor Retention

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- 1) Deliver Meaningful Thanks Yous
- 2) Communicate Impact Consistently
- 3) Gather & Act on Donor Feedback
- 4) Build a Culture of Stewardship

# Key Takeaways

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- ❖ Donor Retention = Relationship (not transaction)
- ❖ Consistent gratitude builds trust
- ❖ Every person on your team can make a difference

Poll 5: What will you implement after today's session?

- a) Better engage board and staff in the donor thank you process
- b) Segment our donors
- c) Create a first-time donor cultivation journey
- d) Share more outcome and impact stories

# Thank You

Shari Pinsky Adams  
Shari Adams Consulting  
[sharipinskyadams@gmail.com](mailto:sharipinskyadams@gmail.com)