

The image features a background of overlapping green and yellow geometric shapes. Three large, overlapping circles in shades of yellow, green, and teal are positioned horizontally across the center. The text is centered within these circles.

Public Fundraising Symposium

**Getting it Right:
Regulation & Best Practice**

A Sustainable Future

How to align your programme to achieve your goals

A SUSTAINABLE FUTURE



INTRODUCTION

- What we'll cover today and how
- First, let's see...
 - Who here has an active F2F campaign?
 - Lead Generation / Two-step?
 - DRTV?
 - Donor development campaigns?

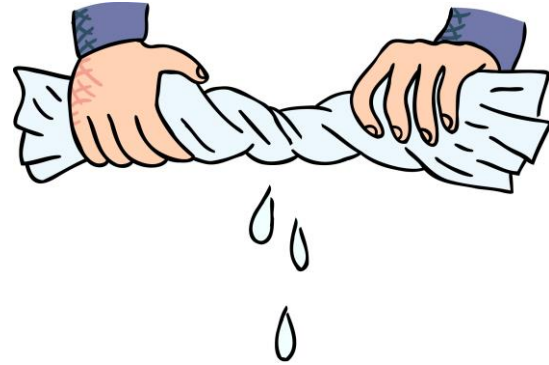
HISTORY

- Face-to-face has been around since 1990s
- Consistently proven to be one of, if not THE, best channel for driving large volumes of new RGs
- Some changes but the product is largely unchanged - \$x/month



FINANCIAL SUSTAINABILITY

- Biggest difference now is the financial return – the same challenge as all of fundraising
- Costs are passed up the supply chain, but average gift is the same
- Need to wring the donation towel dry – from acquisition and development



EXCERCISE

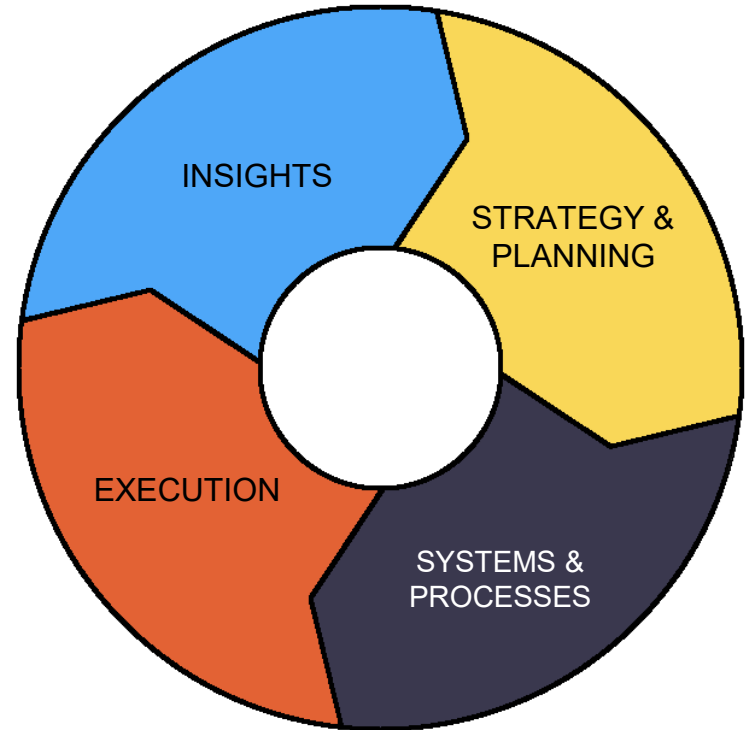
- Let's work together
- Discuss:
 - What are the top three things that determine the success of a Face-to-Face fundraising campaign?
 - If you're F2F campaign is projecting a five-year ROI 1.8, what Key Performance Indicators would you look at to increase the ROI to 2
 - What is the main challenge to a successful Face-to-Face campaign?

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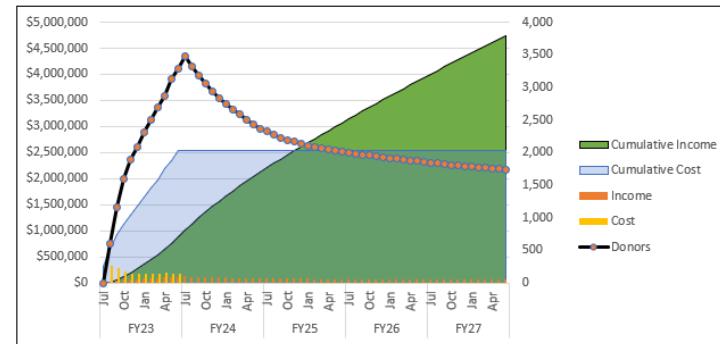
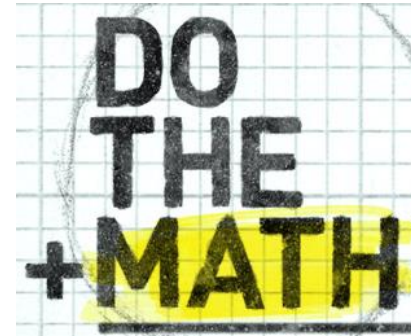
CAMPAIGN / CHANNEL LIFECYCLE

- Detailed plans, budgets and forecasts to achieve strategic goals
- Systems and processes for maximum fundraising effectiveness
- Effective fundraising campaigns with maximum impact
- Reporting and insights that inform your business decisions



BEFORE YOU START

- Understand your fundraising goals! - Why are you doing F2F?
- Decide what success looks like – short AND long term?
- Model out financial returns over time



MODELLING

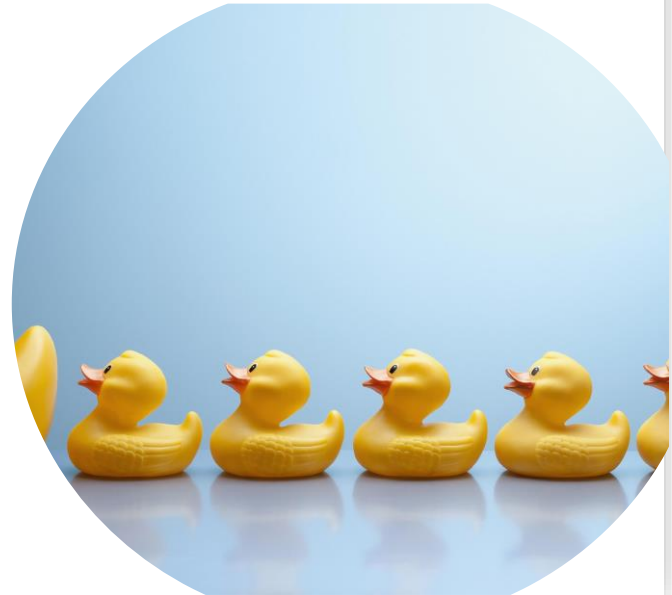
- Different ways to do it
- Use known data
- Or industry standard
- Set long-term targets

Assumptions		Summary	Total	Income	Cum Income	Cum ROI	Acq. Year	5Yr Inc	Exp	5Yr Net	5Yr ROI
Sign-ups	0	Year 1	\$0	\$0	\$0	#DIV/0!	Year 1	\$0	\$0	\$0	0.00
Acquisition CPA	\$0	Year 2	\$0	\$0	\$0	#DIV/0!	Year 2	\$0	\$0	\$0	
Residual Fee %	0%	Year 3	\$0	\$0	\$0	#DIV/0!	Year 3	\$0	\$0	\$0	
Upgrade Average (from month 12)	\$0.00	Year 4	\$0	\$0	\$0	#DIV/0!					
		Year 5	\$0	\$0	\$0	#DIV/0!					
		TOTAL	\$0	\$0	\$0	#DIV/0!					

Monthly KPIs		Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
No. Who Will Become Donors		0	0	0	0	0	0	0	0	0	0	0	0	0	0
Year 1	Month	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
	Payment	0	1	2	3	4	5	6	7	8	9	10	11	12	13
	Average Gift	\$0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Retention	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Jul-23	No. donors:	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Monthly income:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Aug-23	No. donors:		0	0	0	0	0	0	0	0	0	0	0	0	0
	Monthly income:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sep-23	No. donors:			0	0	0	0	0	0	0	0	0	0	0	0
	Monthly income:			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Oct-23	No. donors:				0	0	0	0	0	0	0	0	0	0	0
	Monthly income:				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Nov-23	No. donors:					0	0	0	0	0	0	0	0	0	0
	Monthly income:					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dec-23	No. donors:						0	0	0	0	0	0	0	0	0
	Monthly income:						\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Jan-24	No. donors:							0	0	0	0	0	0	0	0
	Monthly income:							\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Feb-24	No. donors:								0	0	0	0	0	0	0
	Monthly income:								\$0	\$0	\$0	\$0	\$0	\$0	\$0

GET YOUR DUCKS IN A ROW

- Good data management
- Effective supplier relationships/management
- Optimised revenue protection
- Active reporting



COLLABORATE WITH COLLEAGUES TO MAXIMISE REVENUE PROTECTION

- Do you track results? When was the last time you reviewed?



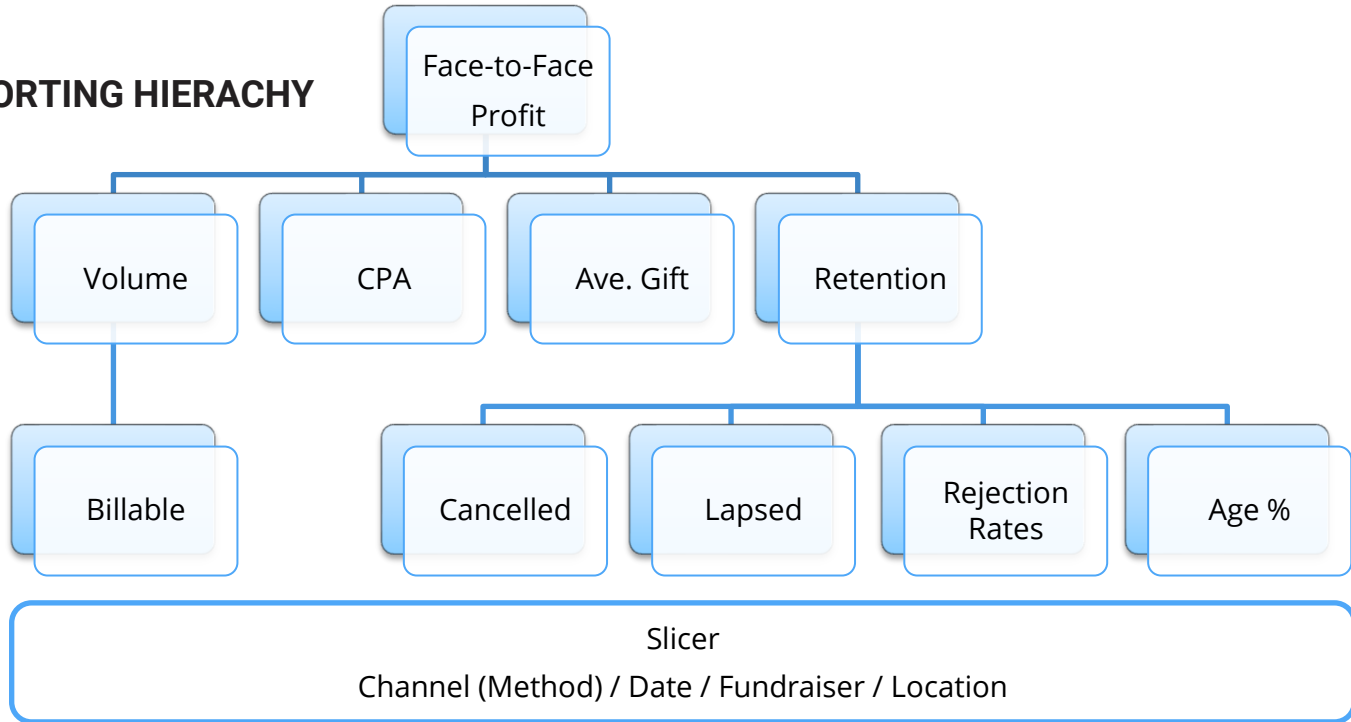
SHORT-TERM KPIs

- ✓ CPA / Net CPA
- ✓ Age - % rather than average
- ✓ Average gift
- ✓ 1, 2, 3 month debit success

LONGER-TERM KPIs

- ✓ ROI
- ✓ LTV (Net)
- ✓ Net income
- ✓ 12, 24+ month retention

REPORTING HIERACHY



THE WHOLE IS GREATER THAN THE SUM OF ITS PARTS

- F2F is a key part of the mix
- But after Upgrades, Reactivation and Conversion
- Budget diversity and flexibility
- Rule of 3: Aim for three sources of new RG donors



WHAT'S NEXT FOR F2F?

- Products and propositions?
- Consumer/Donor behaviour?
- Board expectations?
- Collaboration / ways of working?



IN SHORT

- Good donor retention is only possible with good acquisition
- Know your goals: Plan and model before you start – know what success looks like
- Consider ‘behind the scenes’ and ‘under the bonnet’
- Drive performance, don’t just watch it
- Part of the mix: think about the bigger picture – of Individual Giving
- WE should think about the future NOW

Thank you

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Fundraising Strategy

CRM Revolution

Data Management & Optimisation