



# Finding the Right Donor: Navigating the Donor Research Landscape

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Presented By: Ryan Strawhecker & Brienn Parker, Paul J. Strawhecker, Inc.  
Wednesday, October 20, 2021 | 2:00 – 3:00 p.m.



# A little housekeeping...



*We're recording this webinar!*

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



*Feel free to ask questions!*

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



*We will be live-tweeting!*

Share your highlights and takeaways with the **#qgivwebinar** hashtag, and please make sure to follow **@Qgiv!**



We know the value of relationships and are proud to connect you with Paul J. Strawhecker, Inc., a member of our partner network.

## Powerful Fundraising Technology + Nonprofit Consulting Services



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**Providing High Quality  
Consulting Services to  
Nonprofit Organizations**

# Today's Speakers



**Ryan Strawhecker**  
**Incoming President**

Prior to re-joining Paul J. Strawhecker, Inc. in 2017, Ryan raised funds for 3 Midwest organizations. He has worked in capital campaigns, major and planned giving (including charitable gift annuities), grant writing, and donor research.



**Brienn Parker**  
**Project Associate**

Before joining the Paul J. Strawhecker Inc. team, Brienn helped and supported campaign fundraising at United Way of the Midlands. She currently assists the PJS team with client support, campaign fundraising activities, marketing and donor research and analytics.

# OBJECTIVES

- What types of data are provided through third party services
- How to use donor research data
- How to use donor research to segment donors
- How to use donor research to help prioritize your fundraising time

# WHERE ARE CHARITABLE DOLLARS COMING FROM?



## Where did the generosity come from?

### Contributions by source

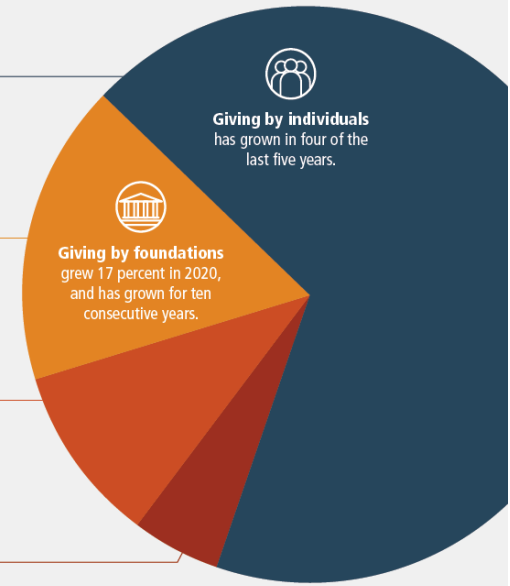
By percentage of the total

**Giving by Individuals**  
\$324.10 billion **69%** ↑2.2%  
increased 2.2 percent over 2019.

**Giving by Foundations**  
\$88.55 billion **19%** ↑17.0%  
increased 17.0 percent over 2019.

**Giving by Bequest**  
\$41.91 billion **9%** ↑10.3%  
increased 10.3 percent over 2019.

**Giving by Corporations**  
\$16.88 billion **4%** ↓6.1%  
declined 6.1 percent from 2019.

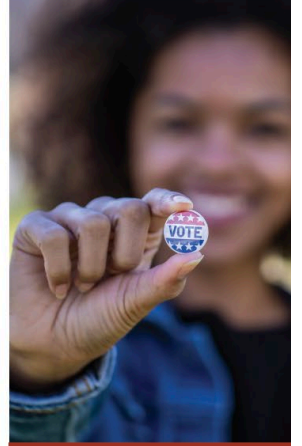



\*All figures on this infographic are reported in current dollars unless otherwise noted.

# WHERE DID CHARITABLE DOLLARS GO?

## Where did the charitable dollars go?

### Contributions by destination



 Giving to public-society benefit organizations increased 15.7 percent in 2020, marking the eleventh consecutive year of growth for this subsector.



Americans responded generously to the unprecedented events and challenges of 2020, with all nine categories of charities receiving emergency giving for COVID-19 relief and racial justice giving.



Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on American's generosity and related historical trends on U.S. charitable giving.

Visit [www.GivingUSA.org](http://www.GivingUSA.org) to learn more and to order your copy of *Giving USA 2021: The Annual Report on Philanthropy for the year 2020*.





# NUMBER OF INDIVIDUALS MAKING GIFTS

- Total giving hit \$471.44 billion in 2020, **increasing 4.6%** over the total of \$449.64 billion contributed in 2019.
- Giving by individuals totaled an estimated \$324.10 billion, **rising 2.2% from 2019**.
- Out of all giving identified, the giving by individuals represented 69%.
- 68% (2018)
- 70% (2017)
- 72% (2016)
- 71% (2015)...
- 84% (1977)



# LANDSCAPE FOR DONOR RESEARCH

How has donor  
research changed over  
the years?

What companies are  
there doing the work?

# DONOR RESEARCH COMPANIES

1970

LexisNexis

1986

DonorScape

1991

iWave  
WealthEngine

2007

DonorSearch

2013

Donorly

# TYPES OF DATA PROVIDED BY 3RD PARTY SERVICES

- Wealth ranking for major gift capacity
- Likelihood of making a major gift based on internal and external giving history
- Estimated 5-year giving capacity based on wealth data
- Giving interests
- Political giving
- Foundation connections
- Upper range of largest external gifts found

# LEARNING MORE ABOUT CURRENT DONORS

- Why they support your organization?
- Who they are?
- What are their interests?
- Who are they giving to?
- How much are they giving?
- Are they giving cash or other assets?



# DONOR RESEARCH EXAMPLE

First	M	Last	DS Rating	Overall	Profile	RFM Total	Age	Foundation	Fnd Corpus	Largest Gift High	Total Likely Charitable Matches	Total Likely Charitable Count	Found ation	Fnd Corpus	NonProfit	Political Total	Largest Gift Low	Capacity Range Based on Wealth	Real Estate Total
			DS1-1	20.2	IDP	110	55	Y	\$0	\$100,001	172,745	125	Y	\$0	M	\$59,995	\$100,000	D - \$500,000 - \$999,999	\$2,751,600
			DS1-1	20.2	IDP	176	64	M	\$0	\$5,000	38,999	66	M	\$0		\$35,374	\$5,000	D - \$500,000 - \$999,999	\$2,402,333
			DS1-1	20.1	IDP	275		Y	\$17,269,438	\$24,999	128,552	153	Y	\$17,269,438	Y	\$43,500	\$10,000	C - \$1,000,000 - \$4,999,999	\$6,439,931
			DS1-1	20.1	IDP	135			\$0	\$2,000,000	2,101,653	26		\$0	Y	\$650	\$2,000,000	I - \$15,000 - \$24,999	\$249,333
			DS1-1	19.9	IDP	27			\$0	\$24,999	37,350	18		\$0	Y	\$2,350	\$10,000	G - \$50,000 - \$99,999	\$657,866
			DS1-1	19.9	IDP	252			\$0	\$5,001	11,751	40		\$0	Y	\$2,350	\$5,000	C - \$1,000,000 - \$4,999,999	\$9,618,063
			DS1-1	19.8	IDP	77			\$0	\$5,000	58,275	67		\$0	M	\$56,275	\$5,000	F - \$100,000 - \$249,999	\$542,623
			DS1-1	19.7	IDP	291			\$0	\$9,999	18,251	63		\$0	M	\$4,500	\$5,000	D - \$500,000 - \$999,999	\$3,249,766

# HOW TO USE DONOR RESEARCH TO SEGMENT DONORS

- Volunteers/Board Members
- Giving Categories
- Age
- Political Giving
- SEC Stock Value
- Real Estate Count/Value



# DONOR RESEARCH OPPORTUNITIES

New Donors

Lost Donors

Annual Giving Donors

Planned Gift Donors

Major Gift Opportunities

Mid-level Donors



# IDENTIFYING MID LEVEL POTENTIAL

- 250 Million individuals above the age of 18
- (160 Million households)
- Demographic Data
- Modeled Consumer Data
- Wealth/Asset Data
- Philanthropic Giving Histories
- “Mid-Level Donors: Where Donor Research Can Make a Huge Difference” Blog

# WHO ARE MID LEVEL DONORS?

- Donors could be a variety of ranges, for example \$500 to \$2,000 or \$1,000 to \$10,000
- Mostly talking about Generation X (39-54) and some Boomers and some Millennials
- Generation X (according to Pew Research):
  - \*79% Religiously Affiliated
  - \*64% Patriotic
  - \*61% White
  - \*44% Not Retirement Confident
  - \*50% Want to see impact
  - \*Want multiple avenues to give
  - \*50% don't mind multiple solicitations
  - \*Willingness to contribute widely

# HOW ARE NONPROFITS ENGAGING MID LEVEL DONORS?

- Does your organization ever ask the question, “How do 45 to 55 year-olds engage with our organization?”
- Generally, don't have a mid-level Resource Development staff member
- Don't consider age at all – only group by amount
- Caught at the bottom of a major gift officer portfolio
- Utilizing Guilds or Special Events

# GROWTH OPPORTUNITIES FOR MID-LEVEL DONORS

- Next After Study (2014 & 2018)
  - 37 Charities
  - \$1-5,000 Donation Amounts
  - 8% Received Phone Calls
  - 31% Communication from a Person
  - 49% No communication at all
- If you don't treat a Mid-Level donor like a Major Donor why would they become one?
- Not Asking Enough of Mid-Level Donors
- Do you have someone doing the asking for mid-level gifts that doesn't pique the interest or have a relationship with the donor?
- Do you solicit your Mid-Level donors differently than Entry Level Donors?

# HOW TO USE DONOR RESEARCH TO HELP PRIORITIZE YOUR FUNDRAISING TIME

- You will need to supplement any research with actual communication or notes from those that know a donor prospect. Without that, you have only half the picture.
- Just because someone is wealthy, does not make them a great major gift prospect.
- It takes time to cultivate large gifts – plan accordingly.
- **It is not wise to put all of your eggs in one basket. Know your donor opportunities and have strategies for them.**



# TAKEAWAYS

- Need to do donor research to understand who your potential: New Donor Opportunities, Lost Donor Opportunities, Mid-Level, Major Gift, Planned Giving
- Some one needs to interact /engage your donors at the correct donor level or you are in danger of losing them.
- Give your “Attention Starved” donors Attention!!



## AFTER RESEARCH

- Increase Communication (Personal Touches)
- Special Events
- Staff Member Responsibilities (Gift Officer)
- Group Dynamics (Guilds, Development Committees)
- Social Network (Religious Affiliation, Social Circles)
- Financial Planner Method (Can you give me 5 names?)
- Social Media / Video / Direct Response Marketing
- Concentrate Appeals on Growing Donor Opportunities



# IMMEDIATE ACTIONS YOU CAN TAKE

1

See what partnerships  
if any your database  
has for donor research

2

Segment out your mid-  
level donors and make  
a plan for more  
creating engagement

3

Talk with your team  
about your 2022 goals  
and see where donor  
research can help you  
with a specific  
donor segment

4

Strategize on how to  
change mailing and  
event invite lists  
depending on donor  
research

# WANT TO LEARN MORE ABOUT YOUR DONORS?

If interested in talking about Donor Research and learning how PJS helps non-profits in this area:

Call for a **FREE 30 MINUTE CONSULTATION** with a member of our team

We can assist with screening your database and can provide information & costs on how our team does donor analytics!





# Questions?

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This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



# Thank you for joining!

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For more information on Qgiv's fundraising platform, contact:

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