

Supporter Monitor

a case study

Ben Smith, Amnesty

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One Year Ago..



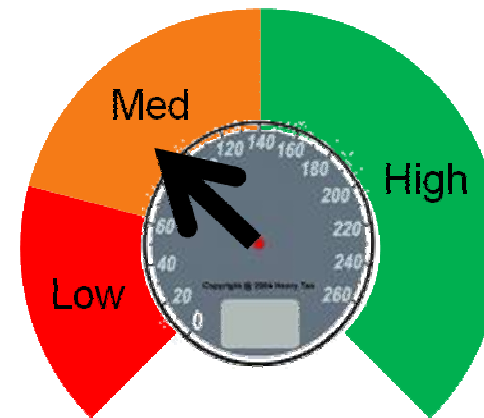


What information do we need?

- Rev Counter



- Speedometer

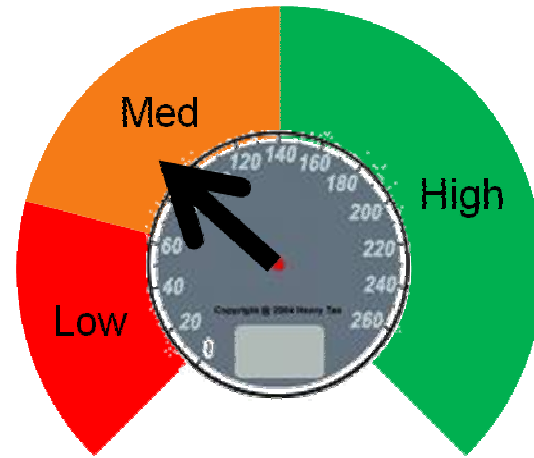
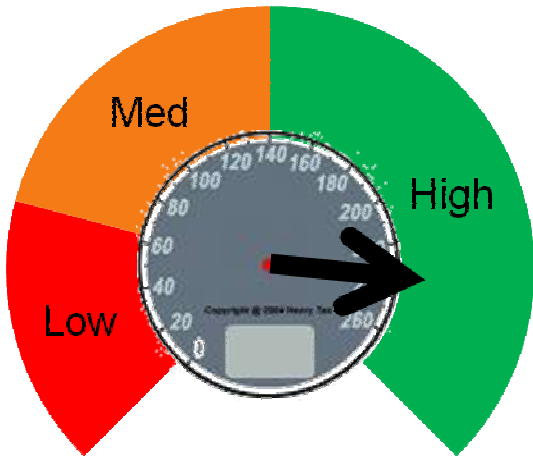
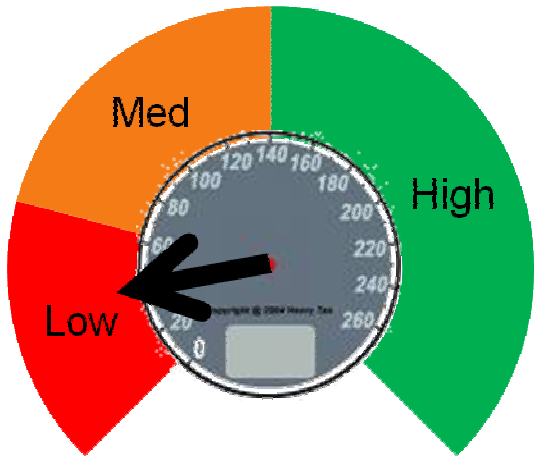


- We know the engine is running
- But what can we do with this information?

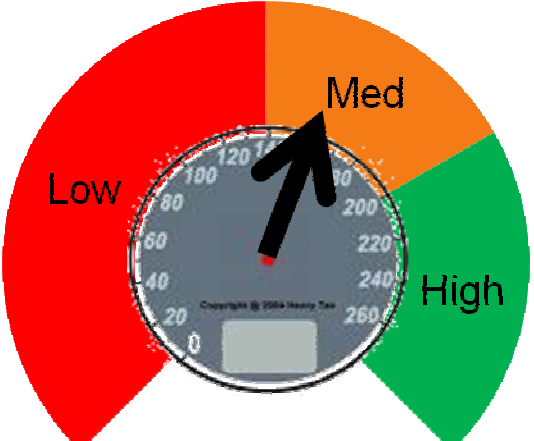
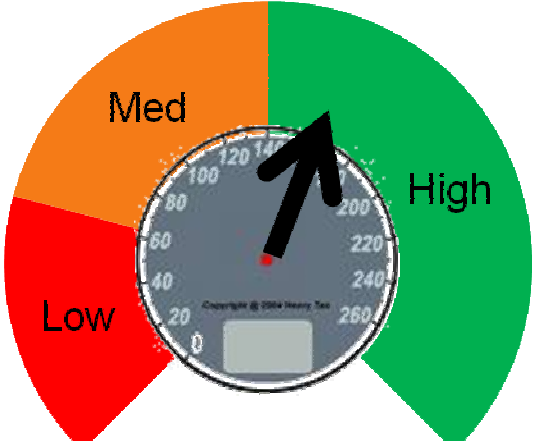
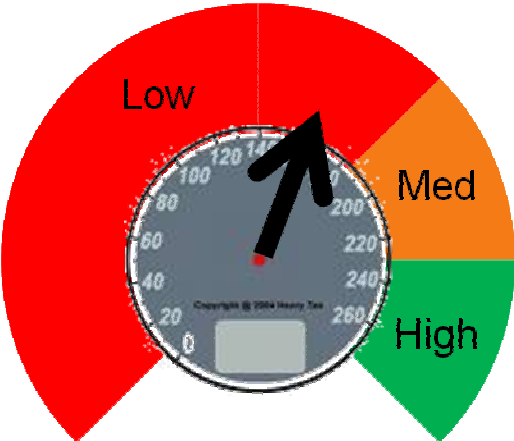
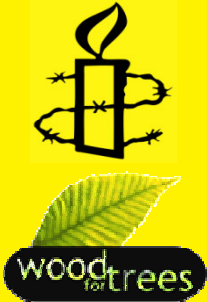
- Information we can use to drive decision-making



Are we all looking at the same dial?



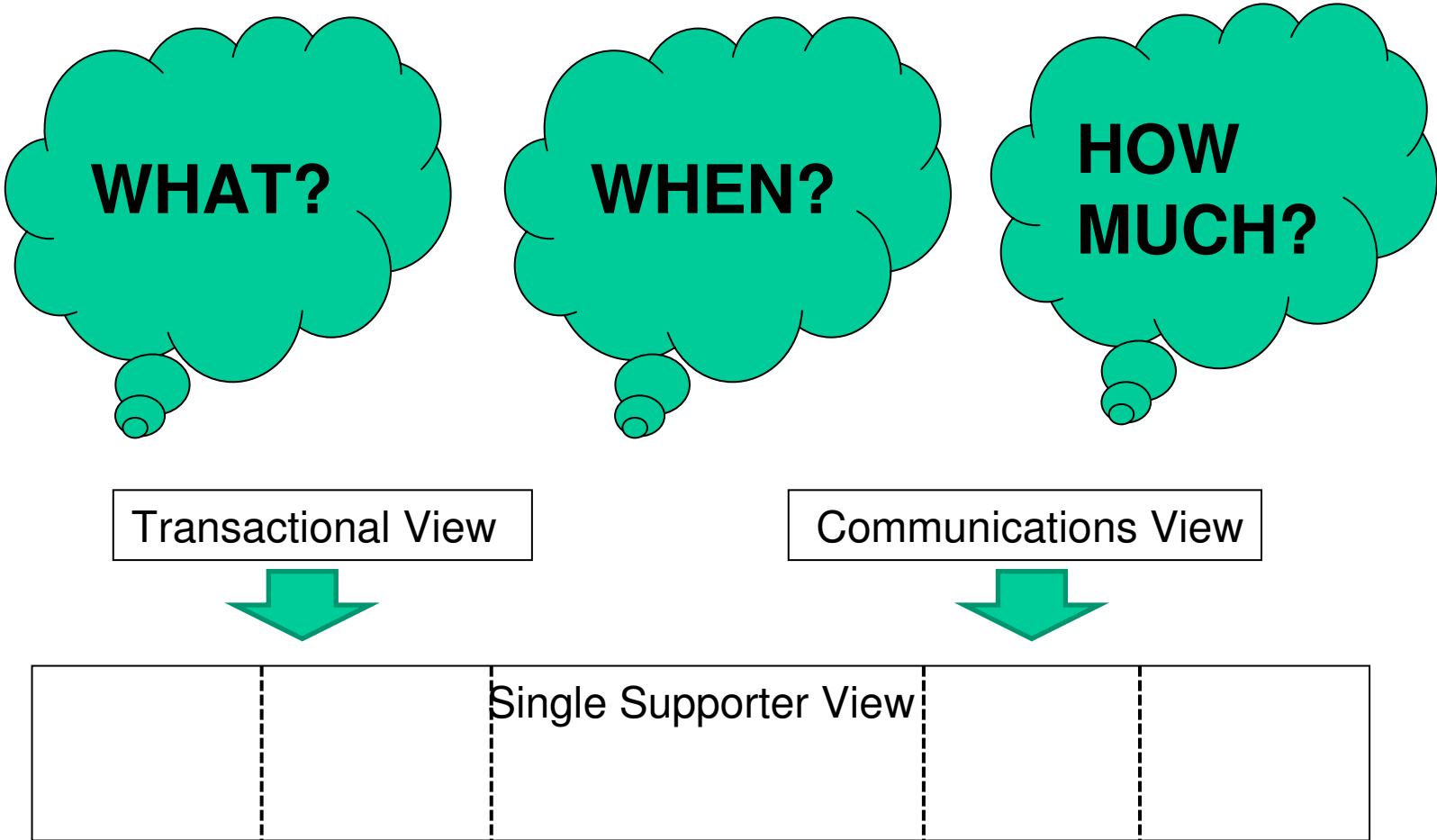
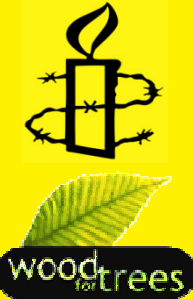
Are we all seeing the same thing?



Today..



Common Definitions



Key concept 1 – WHAT?



- ‘Product’ or ‘Relationship’ definition rules for each transaction or mailing
- Based on source codes, product codes
 - How many members do you have?
 - How many cash appealers do you have?
 - How many responses did the Christmas campaign receive?



Key concept 2 – WHEN?



- Active / Lapsed rule
- Each transaction must have an end / lapse date
- Payment Date / Frequency / Grace Period
 - How many active supporters do you have?
 - How many active cash appealers do you have?
 - How many supporters lapsed last month?



Key concept 3 – HOW MUCH?



- Cash Gifts – one off value
- Regular Gifts - annualised value
- Gift Aid – include or exclude
 - How much is supporter x currently worth?
 - How much money has been received from cash appeals in this financial year?
 - Who has upgraded in the last month?



Example – Transaction 1



Contact Number	Transaction Number	Transaction Date	Source	Product Code	Payment Method	Payment Frequency	Amount
0001	00001	1/1/2009	CAMP1	MEM	DD	M	£10

- Active / Lapsed ?
 - Expected next payment = 1/2/2009
 - Grace Period = 3 months
 - End Date = 1/5/2009
 - Lapsed
- What is the relationship?
 - Membership
- How much is it worth?
 - Monthly DD = 12 instalments in year
 - Annualised value = £10 x 12 = £120



Example – Transaction 2



Contact Number	Transaction Number	Transaction Date	Source	Product Code	Payment Method	Payment Frequency	Amount
00001	00005	1/4/2009	DM001	DM	CASH		£30

- Active / Lapsed ?
 - Expected next payment = N/A
 - Grace Period = 1 year
 - End Date = 1/4/2010
 - Active
- What is the relationship?
 - DM Response
- How much is it worth?
 - £30





Example - Supporter

Contact Number	Transaction Number	Transaction Date	Transaction Type	End Date	Value	Annualised Value
00001	00001	1/1/2009	Membership	1/5/2009	£10	£120
00001	00002	1/1/2009	Raffle	1/1/2010	£25	£25
00001	00003	1/2/2009	Membership	1/6/2009	£10	£120
00001	00004	1/3/2009	Membership	1/7/2009	£10	£120
00001	00005	1/4/2009	DM Response	1/4/2010	£30	£30
00001	00006	1/4/2009	Membership	1/8/2009	£10	£120

- Questions about supporter:
 - Is this supporter active?
 - Is this supporter an active member?
 - What current relationships do they have?
 - How much have they paid this financial year (since 1st April)?



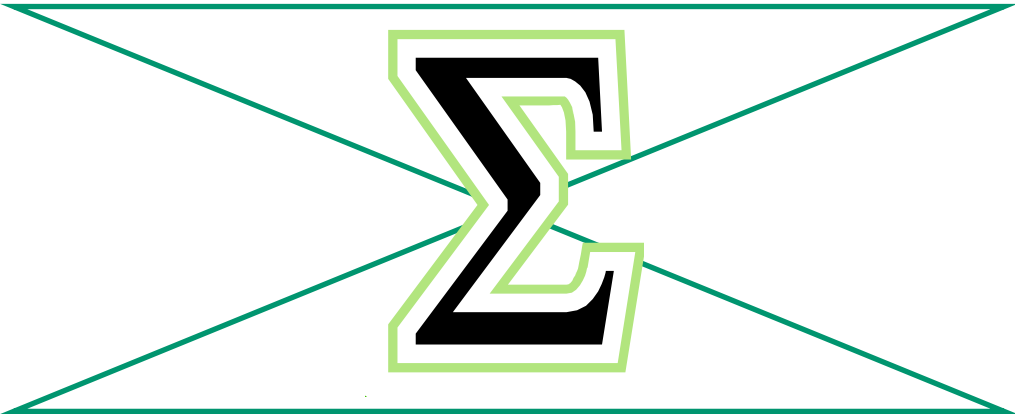
The Reports



Transactional View

Supporter View

Mailing View



SUM
Supporter Monitor Report

Marketing Activity Status

Lifetime Value

Post Campaign Analysis

Selections

Adhoc Analysis



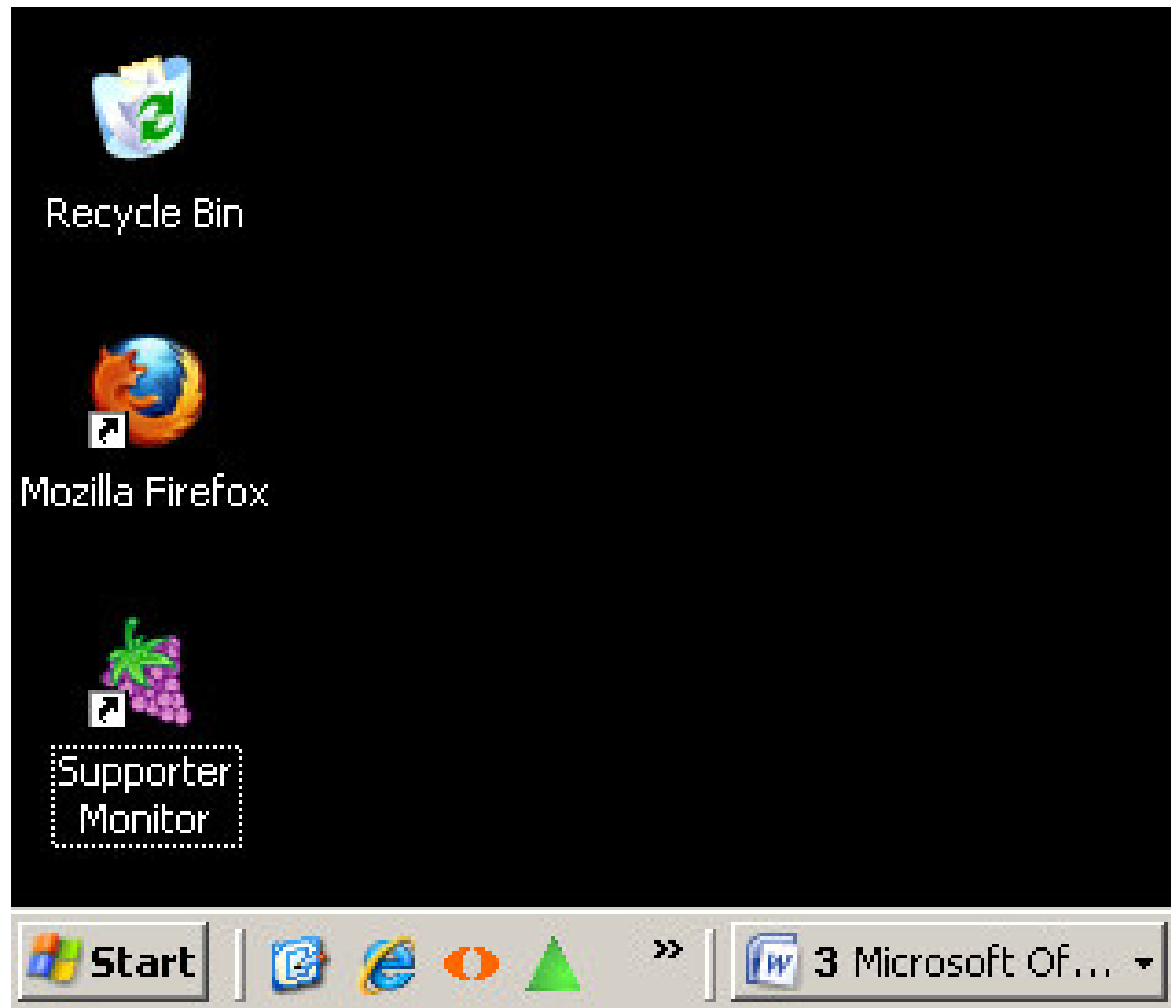
Delivery Method - Excel



- Familiar
- Consistent
- Usability
- Focused
- Compatible



....straight to your desktop



The Report – Numbers View



Select Period

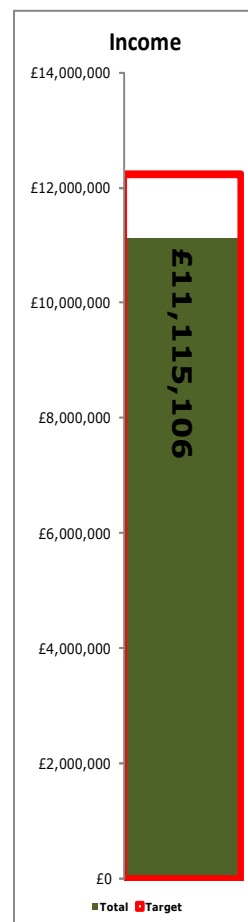
Supporter Monitor Report



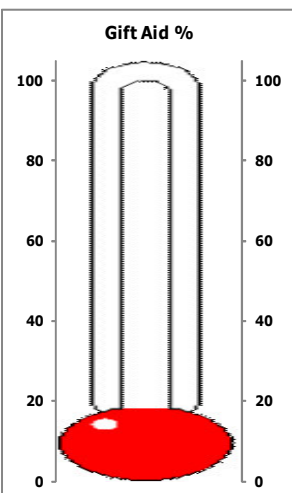
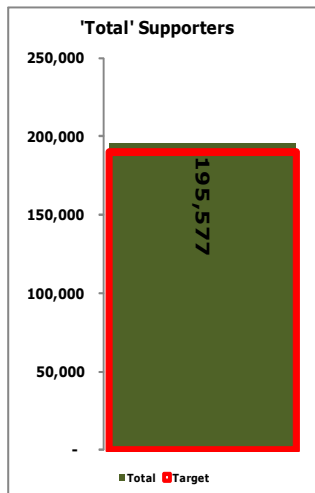
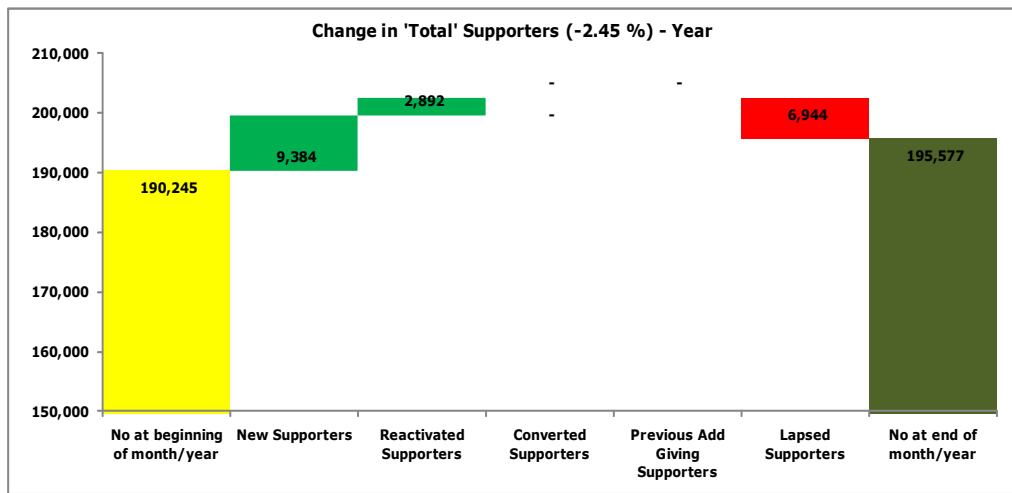
FINANCIAL SUPPORTERS

REGULAR GIVING	Supporters at beginning of month/year	Retained Supporters	New Supporters	Reactivated Supporters	Converted Supporters	Previous Add Giving Supporters	Lapsed Supporters	Attrition Rate	Supporters at end of month/year	Growth	Number Target	Gift Aid	Income	Income Target
Members	123,581	122,236	4,314	1,472	454	394	1,345	1.09%	127,526	3.19%	118,581	68.23%	£ 5,338,878	£ 5,872,766
Donors	39,924	37,020	2,542	540	-	24	2,904	7.27%	37,222	-6.77%	39,924	75.83%	£ 2,305,006	£ 2,535,507
Members/Donors Combined	168,548	159,948	8,172	2,676	-	490	8,600	5.10%	162,686	-3.48%	168,548	70.12%	£ 7,809,682	£ 8,590,650
Other - Additional Giving	44,119	41,726	3,146	2,390	-	-	2,394	5.43%	44,868	1.70%	44,119	64.42%	£ 1,690,115	£ 1,859,126
Total	190,245	183,301	9,384	2,892	-	-	6,944	3.65%	195,577	2.80%	190,245	69.87%	£ 11,115,106	£ 12,226,617

ADDITIONAL GIVING	Supporters at beginning of month/year	No who gave in month / year	% who gave in month / year	No who gave for first time	No Reactivated	gave in month / year	Lapsed Supporters	Attrition Rate	Supporters at end of month/year	Growth	Number Target	Gift Aid	Income	Income Target
Cash Appeal	26,802	7,277	21.7%	1,986	1,405	10,668	2,526	9.42%	27,668	3.23%	26,802	73.48%	£357,275	£ 393,003
Raffle	13,672	2,918	17.1%	1,155	498	4,572	1,754	12.83%	13,572	-0.73%	13,672	74.89%	£155,729	£ 171,302
Other	11,242	782	5.6%	1,699	592	3,073	1,461	12.99%	12,073	7.39%	11,242	38.40%	£1,176,164	£ 1,293,781
All	44,119	11,752	21.3%	3,146	2,390	17,288	3,367	7.63%	46,288	4.92%	44,119	64.42%	£ 1,690,115	£ 1,859,126



Select Supporter Group



The Report – Values View



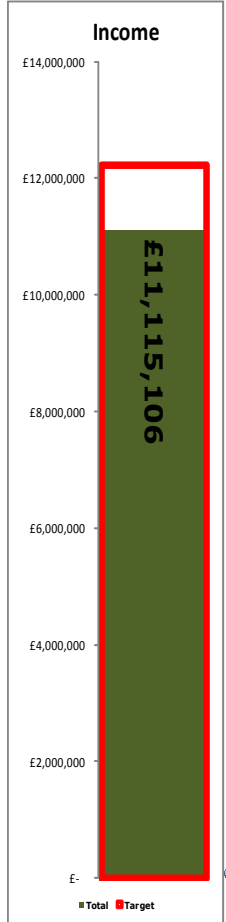
Select Period

Supporter Monitor Report

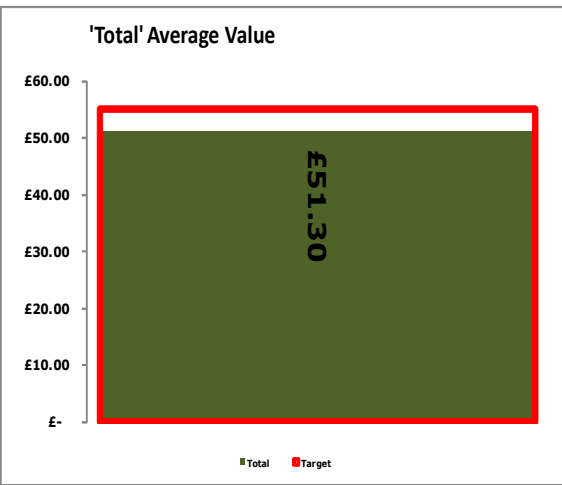
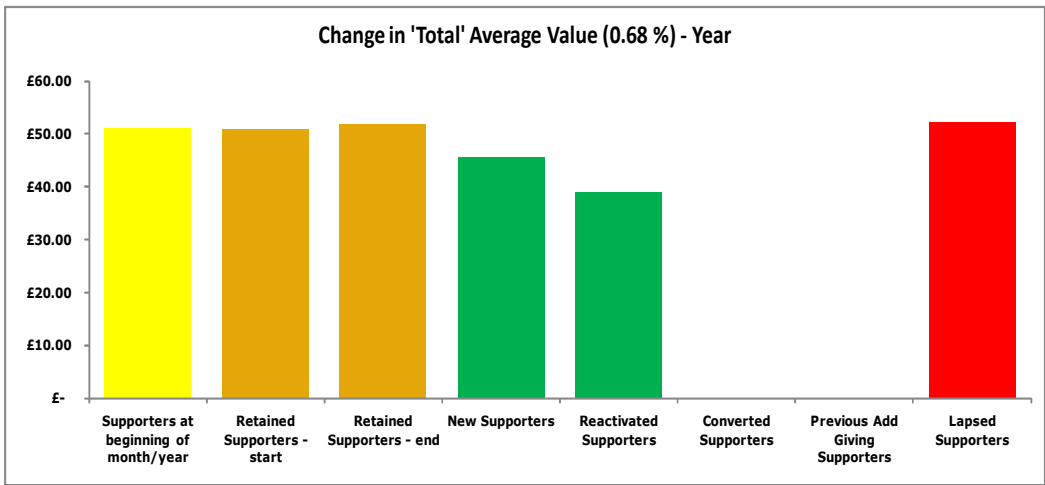
FINANCIAL SUPPORTERS (Annual Values)

REGULAR GIVING	Supporters at beginning of month/year	Retained Supporters - start	Retained Supporters - end	New Supporters	Reactivated Supporters	Converted Supporters	Previous Add Giving Supporters	Lapsed Supporters	Supporters at end of month/year	Growth			Value Target	Income	Income Target
Section Member - Committed	£ 47.46	£ 47.28	£ 48.42	£ 39.77	£ 43.54	£ 30.13	£ 40.29	£ 50.68	£ 47.94	1.02%			£ 50.00	£ 5,338,878	£ 5,872,766
Trust Committed Givers	£ 68.51	£ 68.70	£ 69.27	£ 70.30	£ 61.73	£ -	£ 76.49	£ 67.44	£ 69.24	1.06%			£ 65.00	£ 2,305,006	£ 2,535,507
Section / Trust Combined	£ 50.96	£ 50.84	£ 51.86	£ 45.55	£ 38.94	£ -	£ 39.20	£ 52.22	£ 51.30	0.68%			£ 50.00	£ 7,809,682	£ 8,590,650
Other - Additional Giving	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -				£ -		
Total	£ 50.96	£ 50.84	£ 51.86	£ 45.55	£ 38.94	£ -	£ -	£ 52.22	£ 51.30	0.68%			£ 55.00	£11,115,106	£12,226,617

ADDITIONAL GIVING (Cash Values)	Supporters at beginning of month/year	Retained Supporters - start	Retained Supporters - end	New Supporters	Reactivated Supporters			Lapsed Supporters	Supporters at end of month/year	Growth	of Gifts in month / year	Average Value of Gifts in month / year	Value Target	Income	Income Target
Cash Appeal	£ 18.68	£ 18.78	£ 18.90	£ 15.24	£ 17.62			£ 17.99	£ 18.56	-0.66%	1.30	£ 16.11	£ 20.00	£357,275	£ 393,003
Raffle	£ 18.73	£ 18.83	£ 18.90	£ 19.93	£ 18.17			£ 18.37	£ 18.97	1.25%	1.05	£ 20.26	£ 20.00	£155,729	£ 171,302
Other	£ 116.95	£ 124.14	£ 130.60	£ 89.93	£ 100.54			£ 91.31	£ 122.76	4.96%	1.48	£ 161.37	£ 100.00	£1,176,164	£ 1,293,781
ALL	£ 42.35	£ 41.97	£ 43.49	£ 52.26	£ 38.40			£ 44.63	£ 43.84	3.52%	1.34	£ 45.41	£ 20.00	£ 1,690,115	£ 1,859,126



Select Supporter Group



So where are we now?

