gravyty

Donor engagement benchmark report

Insights into the state of donor engagement and pipeline from 160+ fundraising organizations.
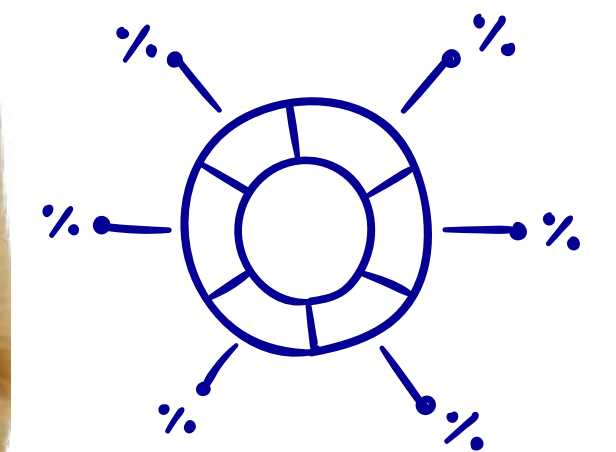
Table of contents

Introduction

Donor engagement isn't one-size-fits-all for each organization. It's made up of all the little (and big) things your organization does to build donor relationships by making them feel heard, valued and appreciated.

In an increasingly digital world and one that's facing economic uncertainties, fundraisers are learning to evolve and adapt their donor engagement strategies in order to meet ambitious goals.

We surveyed education and nonprofit fundraising leaders to gauge the current state of donor engagement and pipeline building activities.

Key findings

Fundraisers reach out to a donor an average of **5x per year**

Fundraisers make an average of **3 contact attempts** before disqualifying a prospect

70% of gift officers are assigning new donors to portfolios at least quarterly

Nearly half of organizations are using **text and video** to engage donors

In 2024, fundraisers will invest in **'improving donor engagement'** and **'enhancing pipeline development and qualification'** to achieve goals
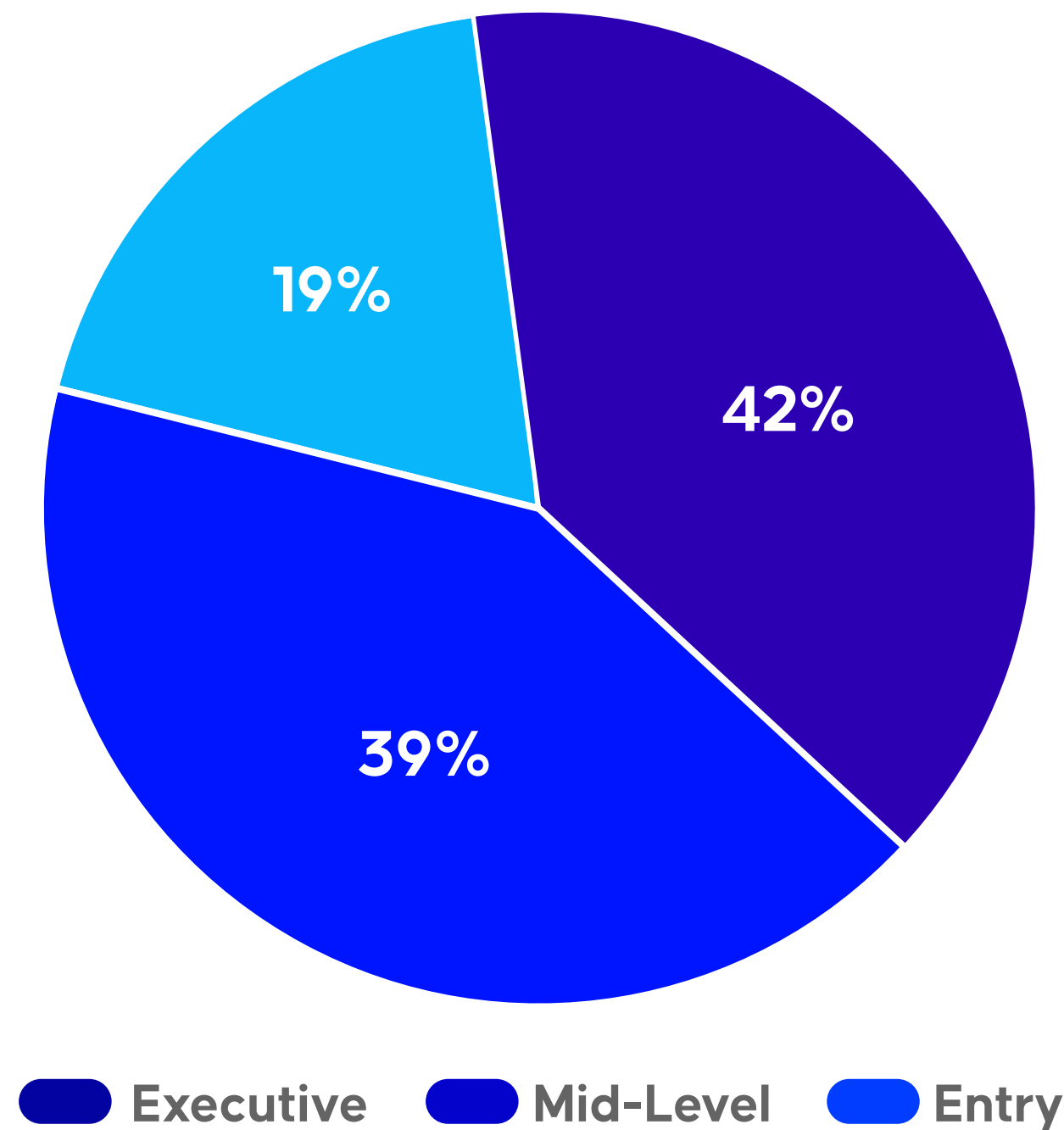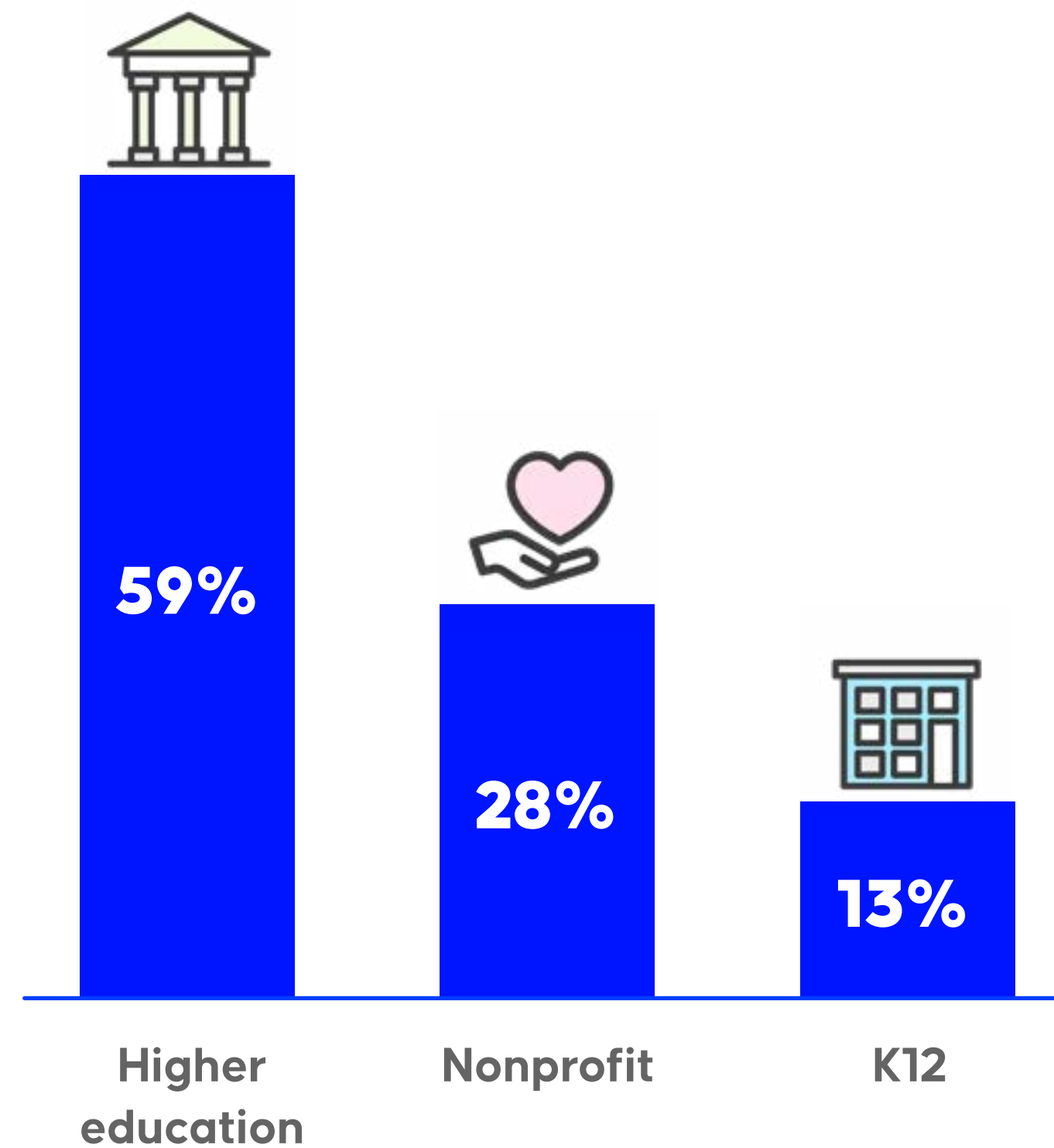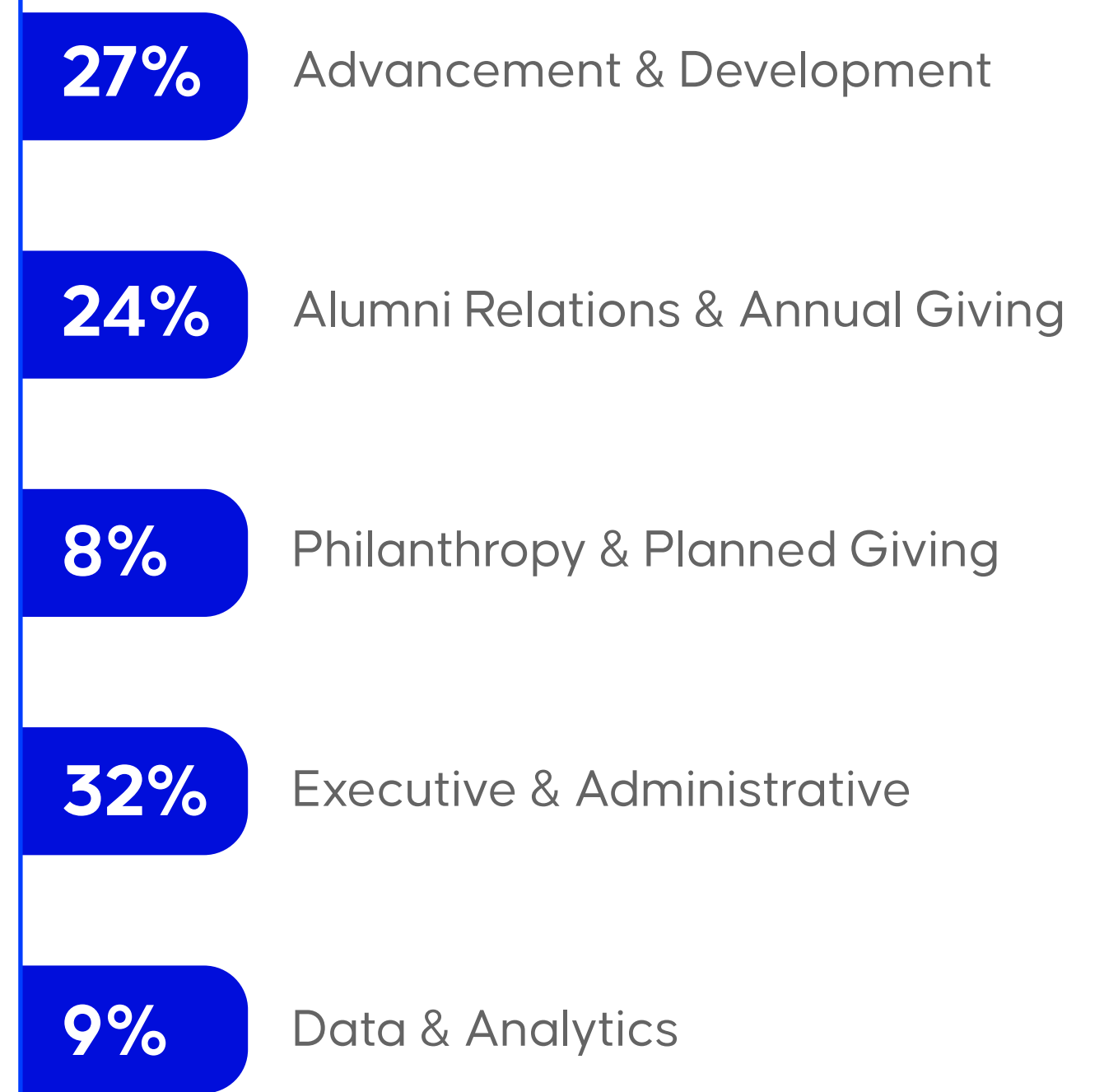
gravyty

Methodology

Methodology

We surveyed over 160 fundraising professionals across the higher education, K12 and nonprofit sectors regarding their current strategies, goals, challenges and tactics related to donor pipeline and donor engagement.

Industries

- Higher education: 59%
- Nonprofit: 28%
- K12: 13%

- Executive: 42%
- Mid-Level: 39%
- Entry: 19%

Job Roles

- 27% Advancement & Development
- 24% Alumni Relations & Annual Giving
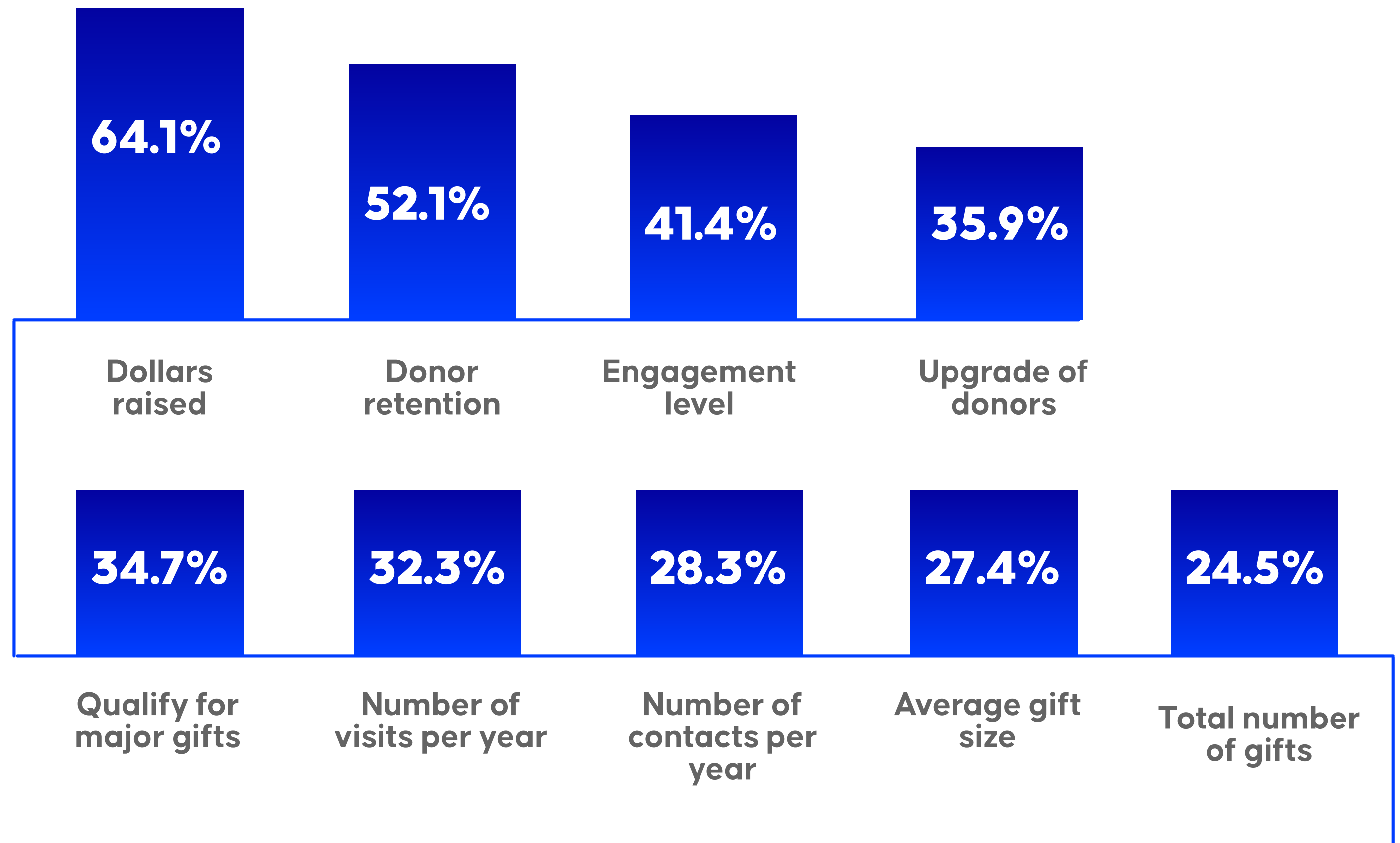- 8% Philanthropy & Planned Giving
- 32% Executive & Administrative
- 9% Data & Analytics

gravyty

Benchmarks
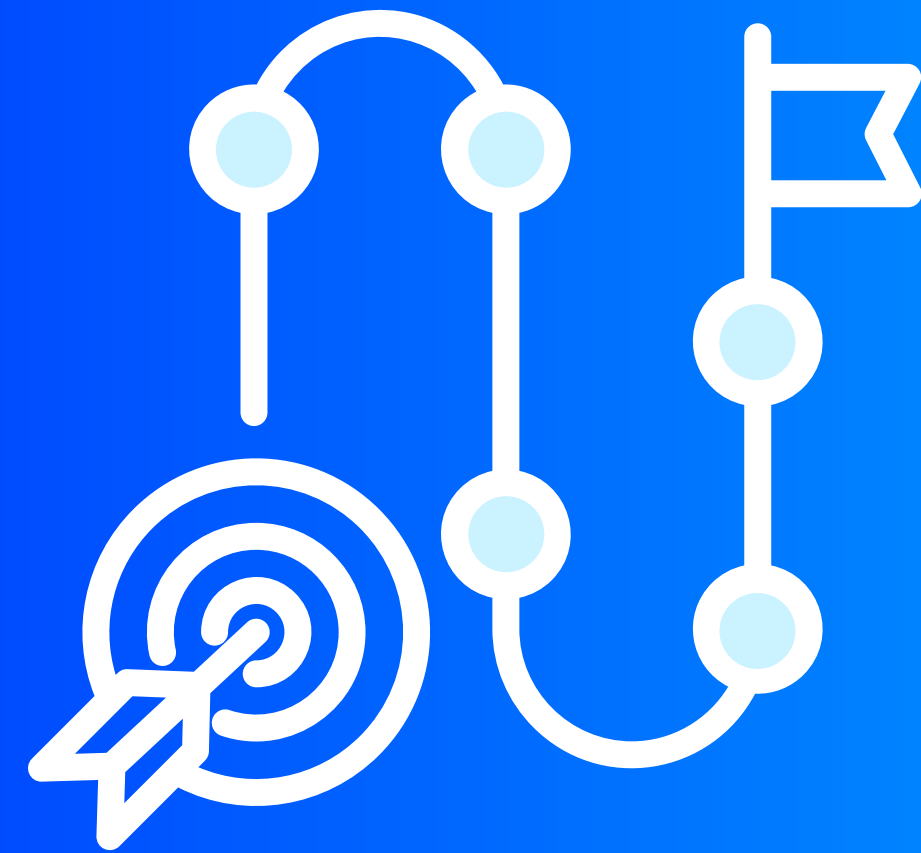
Goals and strategies for success

○ **Dollars raised, donor retention and donor engagement are the top three KPIs** organizations use to measure overall success.

○ **One third of fundraisers surveyed** consider "upgrade of donors" a key indicator of fundraising success.

Top KPIs in order of importance

Dollars raised	Donor retention	Engagement level	Upgrade of donors	
64.1%	**52.1%**	**41.4%**	**35.9%**	

Qualify for major gifts	Number of visits per year	Number of contacts per year	Average gift size	Total number of gifts
34.7%	**32.3%**	**28.3%**	**27.4%**	**24.5%**

gravyty

Top strategies for success in 2023

Respondents cited the following themes as among the most effective strategies for 2023 success:

Hiring key fundraising and leadership roles

Omnichannel engagement, including text, social media, email and video

Innovation, such as AI and predictive modeling

Streamlining technology, consolidating vendors and workflow automation

Improving retention through personalized outreach and stewardship

gravyty
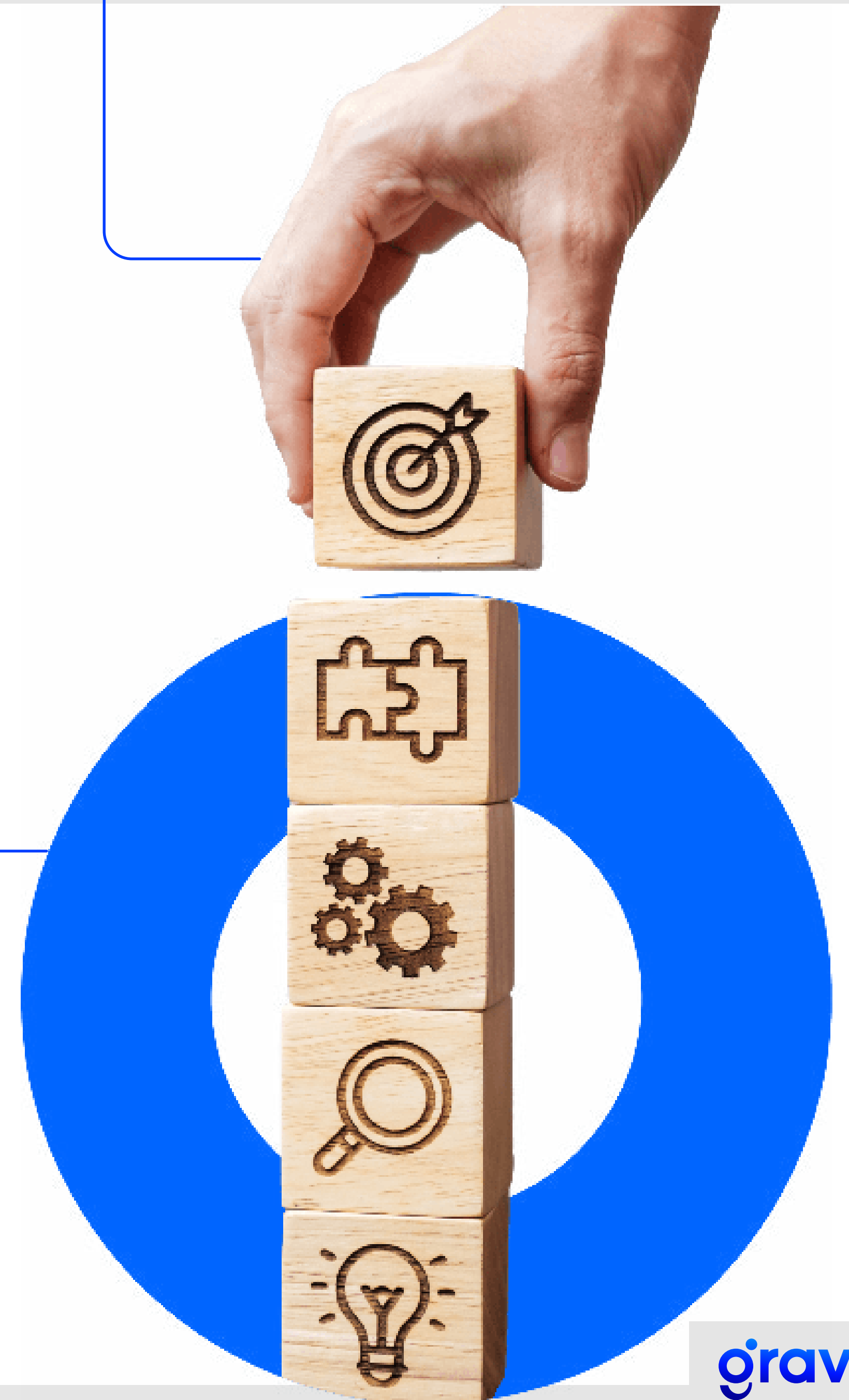
Teams and staffing

Major gift officers make up 43% of fundraising teams today. For future roles, organizations are looking to hire two additional major gift officers and 1.7 leadership or mid-level gift officers.

Current staff breakdown by role

43%

24%

21%

11%

- ■ Major Gift Officer
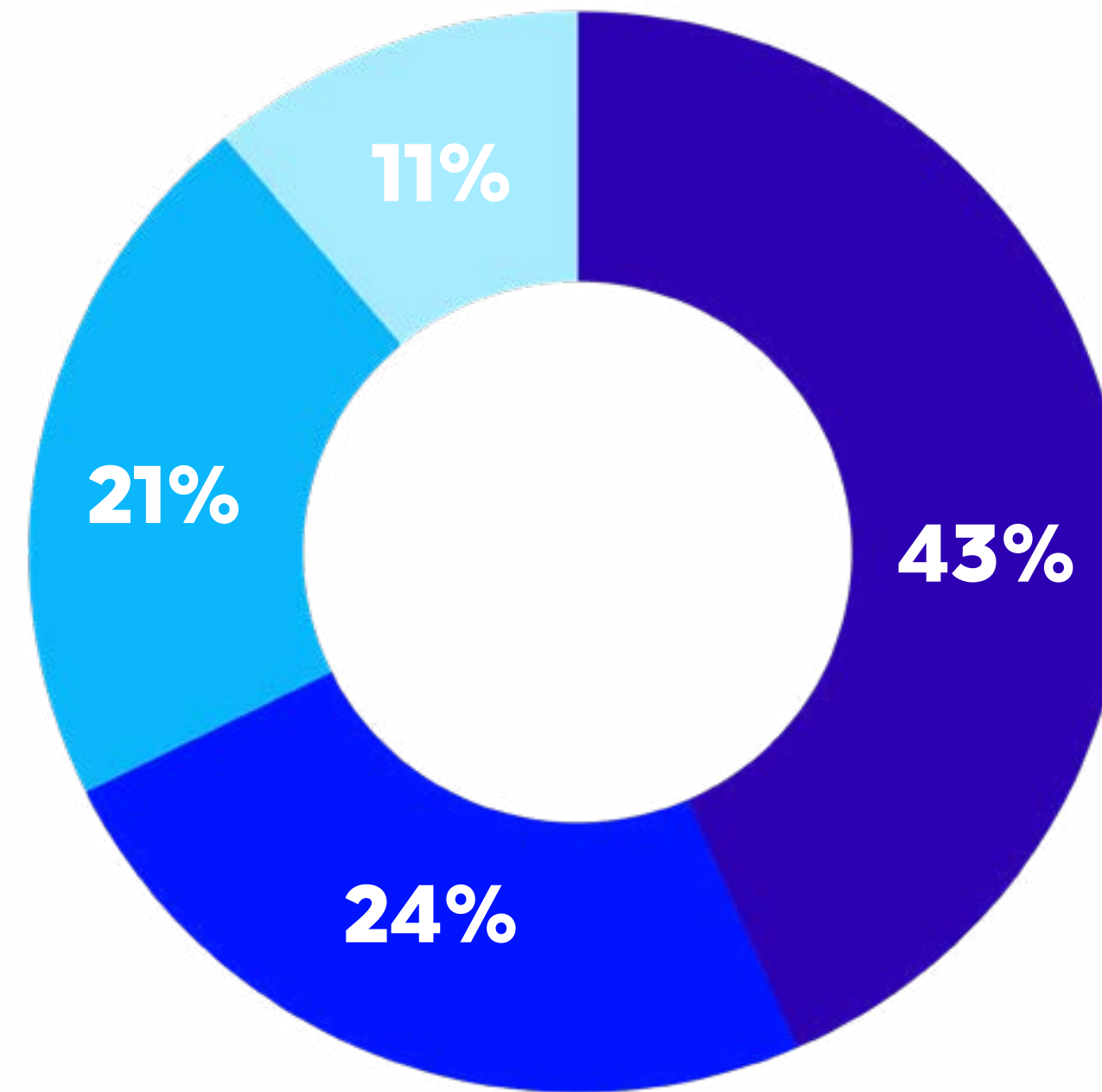- ■ Leadership/Mid-Level Gift Officer
- ■ Annual Giving Officer
- ■ Digital Gift Officer/Digital Experience Officer

Average # of future hires by role
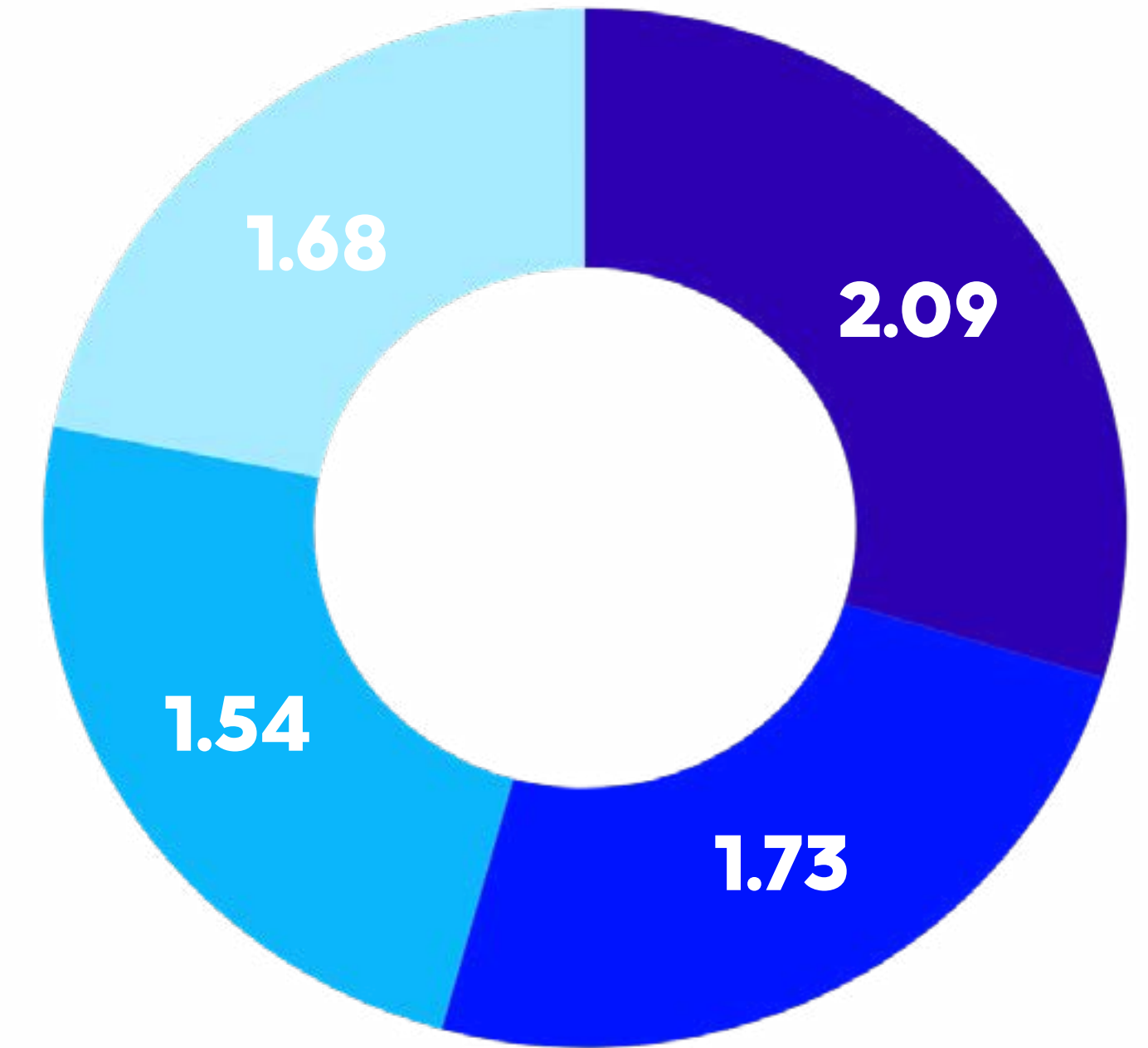
2.09

1.73

1.54

1.68

- ■ Major Gift Officer
- ■ Leadership/Mid-Level Gift Officer
- ■ Annual Giving Officer
- ■ Digital Gift Officer/Digital Experience Officer

gravyty

Changes in the work environment

57%

of fundraisers today work in either a remote or hybrid environment.

Work environment by location

56.9% 43.1%

■ Hybrid & remote ■ In office
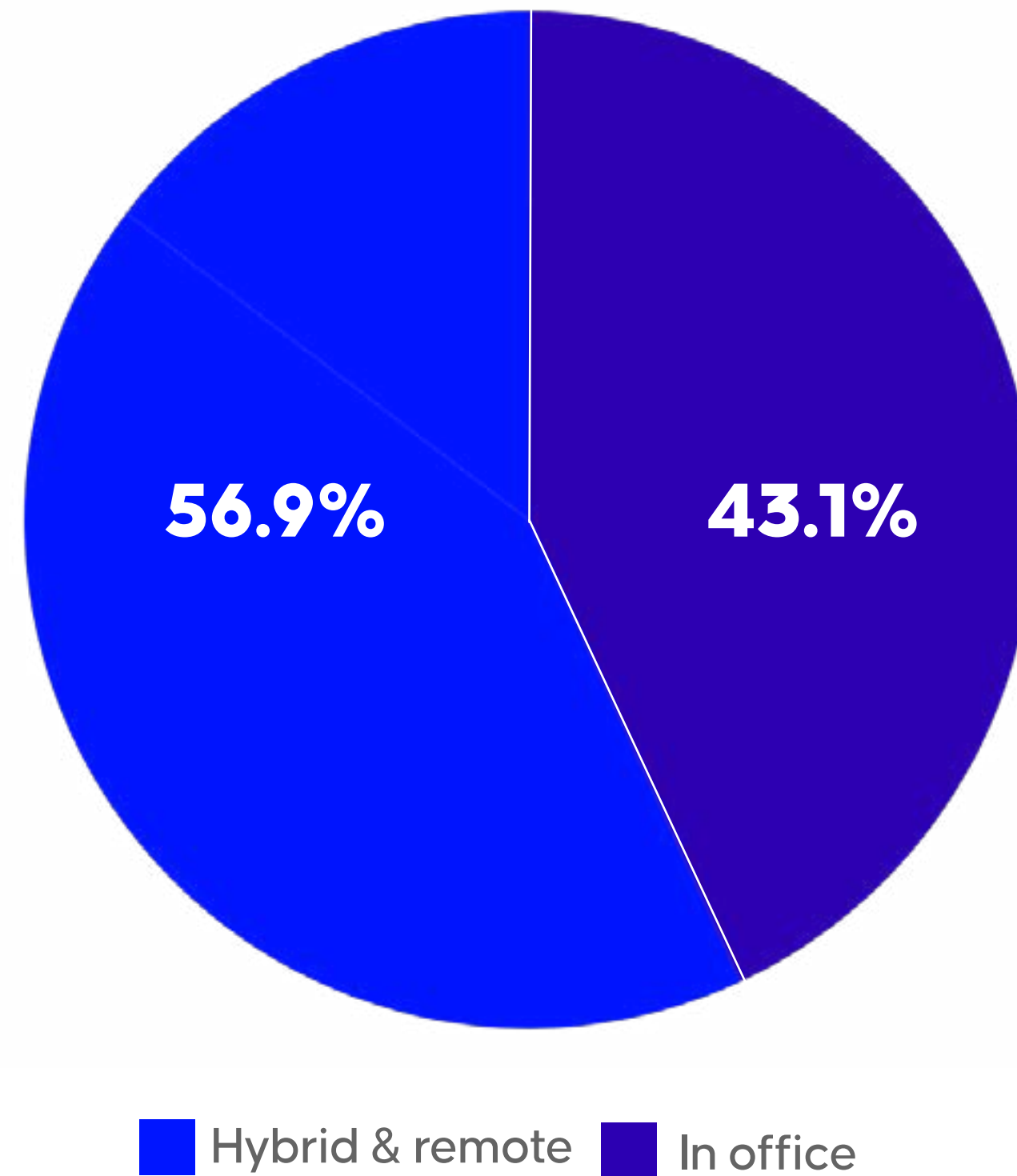
Work environment by role

	In-Office	Hybrid	Remote
Major Gift Officer	41.3%	44.3%	14.4%
Digital Gift Officer/Digital Experience	43.1%	40.1%	16.8%
Leadership/ Mid-Level Gift Officer	44.9%	40.7%	14.4%
Annual Giving Officer	43.1%	43.7%	13.2%

gravyty

Staff travel

50% of major gift officers are traveling at least three to four weeks per quarter, with 19% traveling two weeks per month

28% of leadership/mid-level giving officers travel one to two weeks per quarter, and 25% travel at least three to four weeks per quarter

38% of annual giving officers travel at least one to two weeks per quarter

16% of digital giving officers travel one to two weeks per quarter

Additional resources for donor outreach

Over 60% of fundraisers say they leverage **faculty/staff** and **alumni volunteers** for donor outreach

Faculty/staff
65.3%

Alumni Volunteers
62.9%

Students
45.5%

Unaffiliated Volunteers
19.2%

Hired Contractors
16.2%

Other
13.8%

gravyty
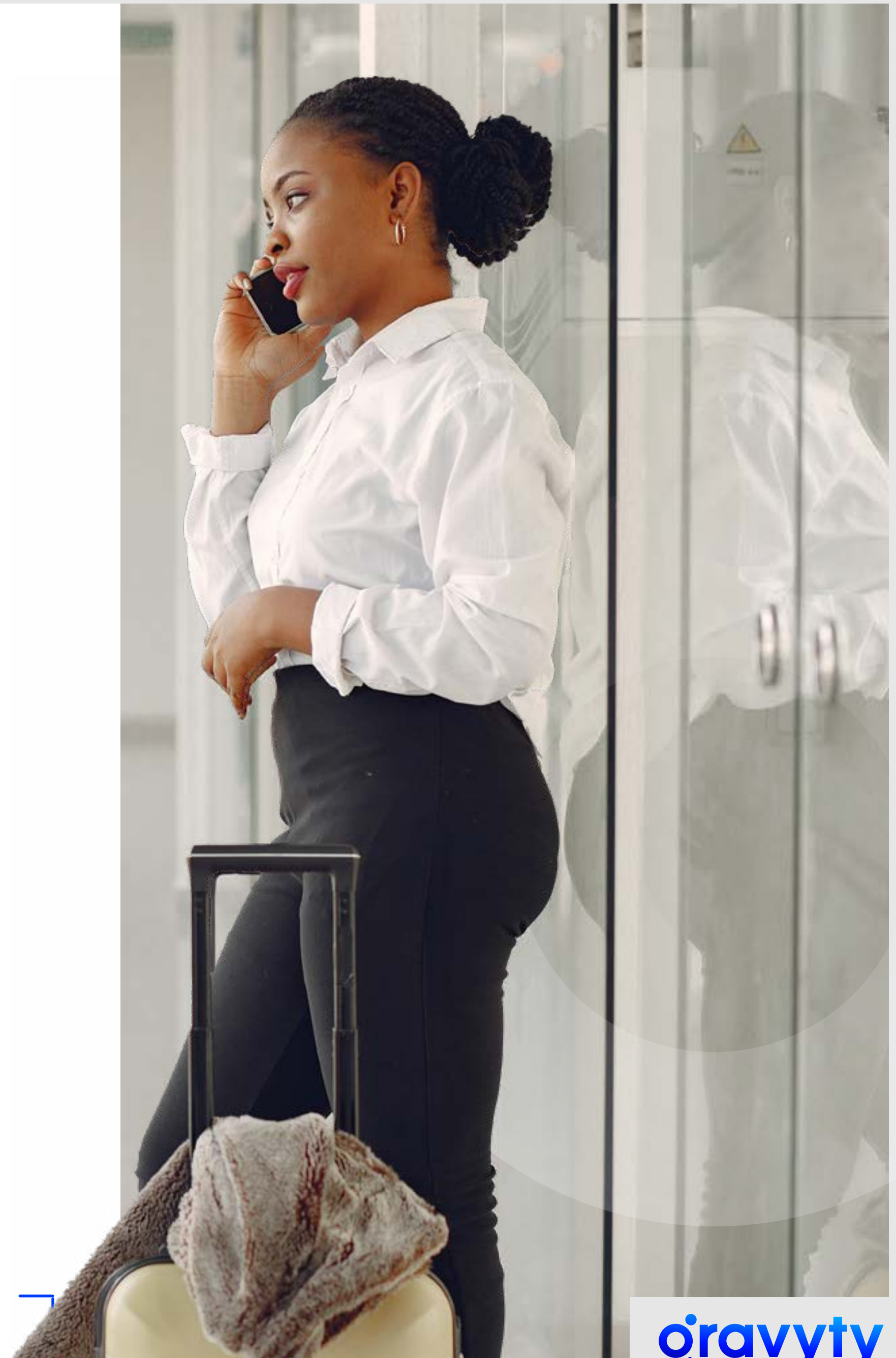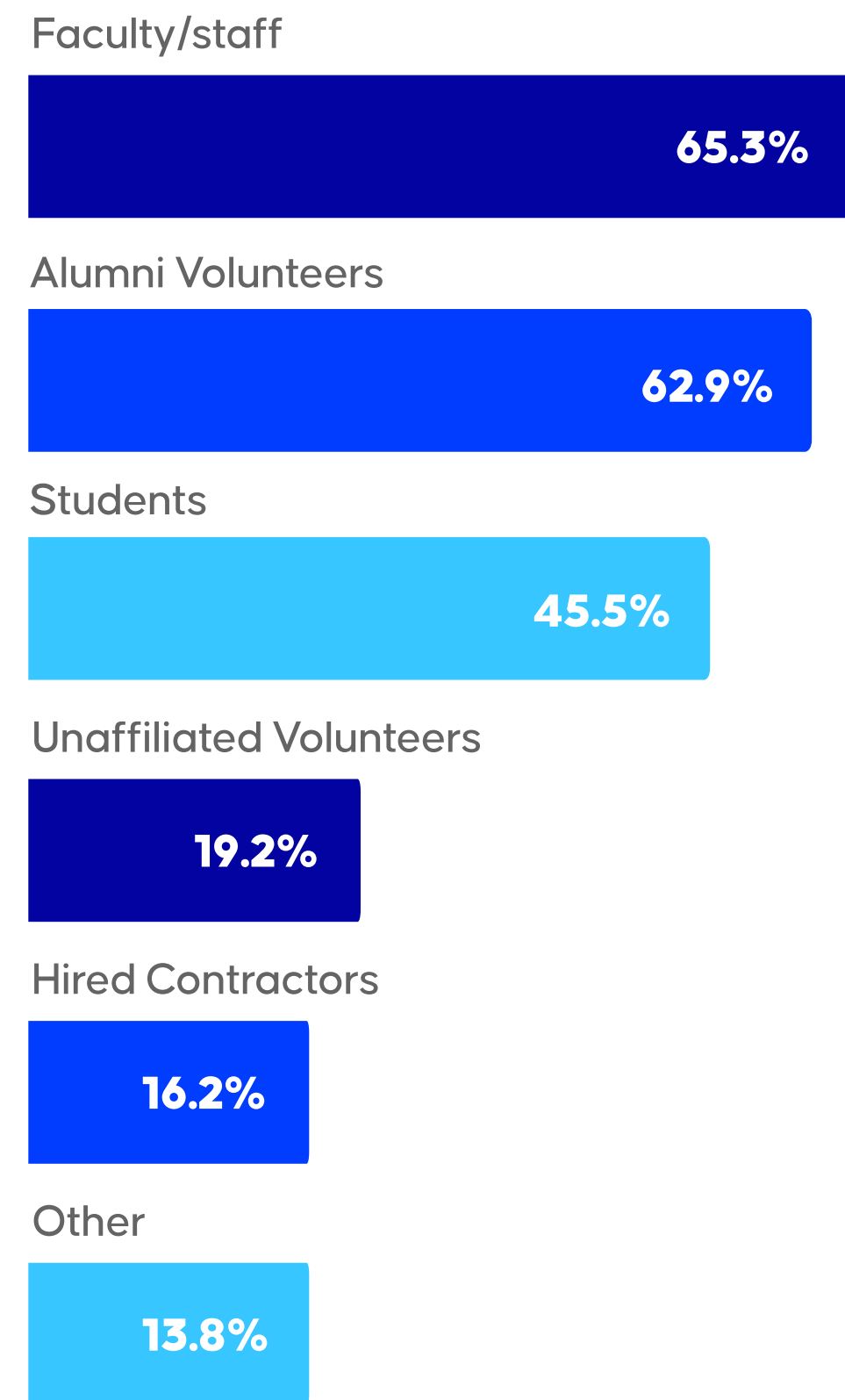
Top 5 challenges facing fundraising teams

Fundraising teams cited key challenges that fell into the following categories:

Staffing

Lack of staff or staff turnover.

Database and software issues

Manual processes, lack of automation, and techstack management.

Donor engagement and pipeline management

New donor discovery and internal pipeline and portfolio procedures.

Nearly one-third of respondents said a lack of personnel or turnover was their biggest pain point.
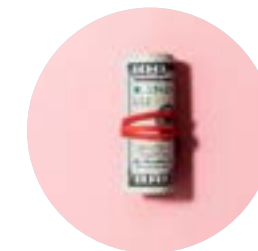
Donor communication

Donor responsiveness and measuring outreach effectiveness.

Resource limitations

Lack of resources or budget constraints.

gravyty

Donor engagement tactics

Video and text are growing channels fundraisers use to deliver personalized and scalable donor outreach for discovery and mid-level giving teams, with nearly half (41% and 45% respectively) already using these channels.

Outreach channels

What are the channels your team uses for discovery and mid-level/leadership giving?

Channel	Percentage
Email	94%
Phone	82%
Direct Mail	75.4%
Social Media	51.5%
Linkedin	50.3%
Text	44.9%
Video	40.7%
Personalized Landing Pages	13.8%

Video 41%

Email 94%

Direct mail 75%

Linkedin 50%

Text 45%

Social media 51%

Phone 82%

Personalized Landing Pages **14%**

gravyty
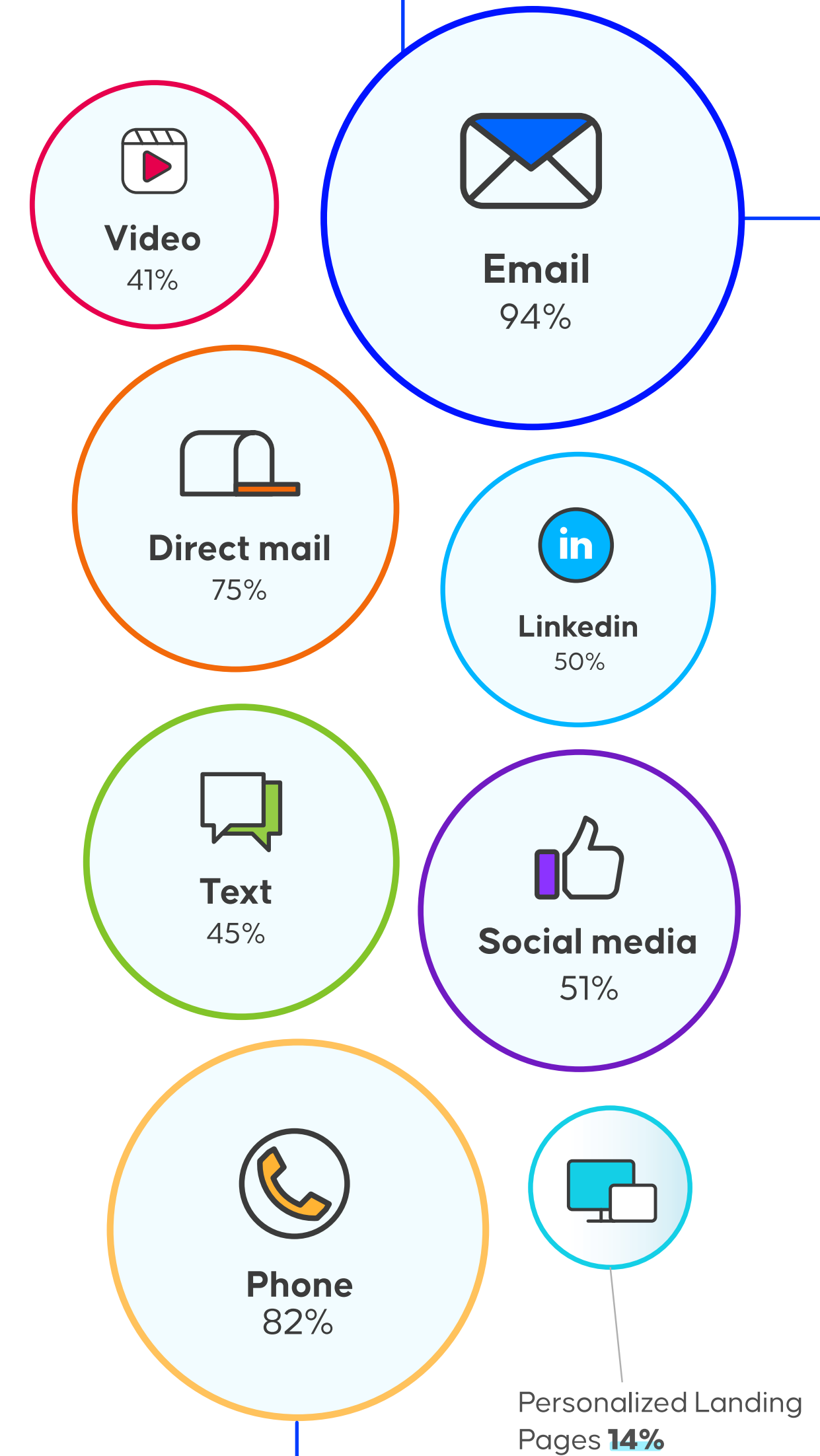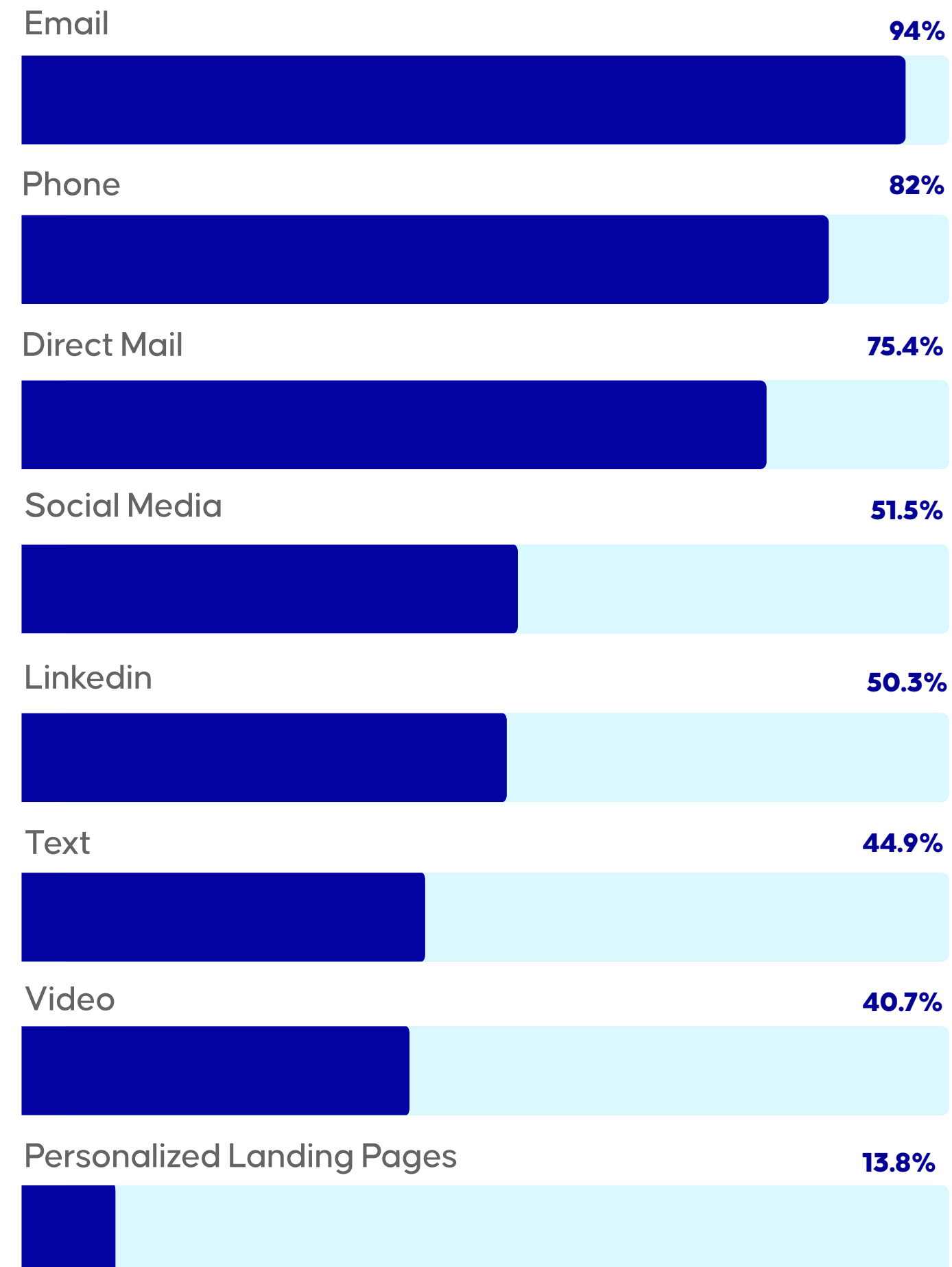
Number of touchpoints

The majority of fundraisers (49.1%) say they reach out to an individual donor 4 to 6 times per year. The average number of outreach per donor is 5 times per year.

1-3 times:
27.5%

4-6 times:
49.1%

7-10 times:
10.8%

10+ times:
12.6%

gravyty

Donor prospecting and portfolio management

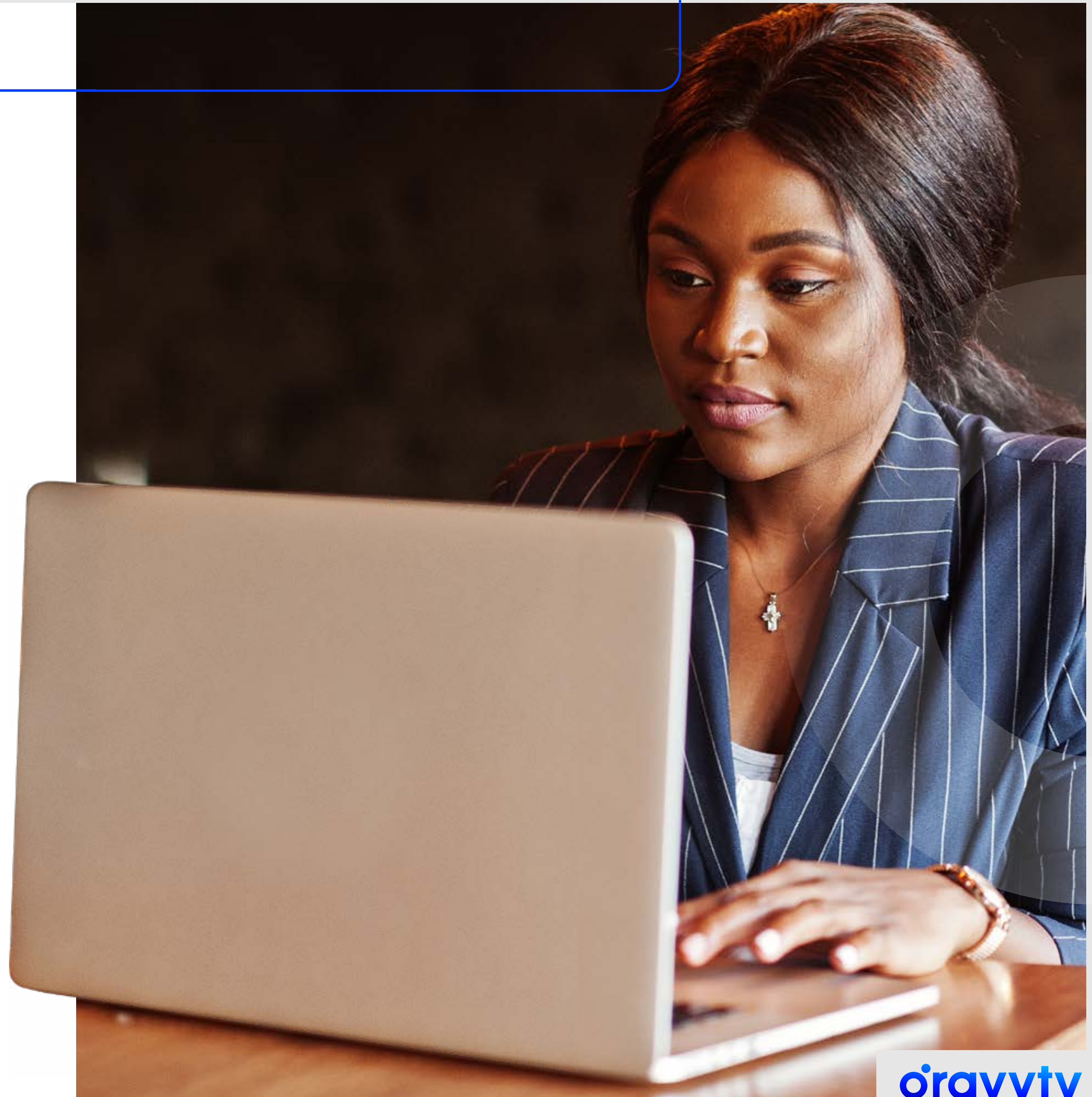Annual giving portfolios are the largest, according to our survey data - with an average of 1,161 donors.

Gift size benchmarks by giving category

Major Gift Officer	
Lowest Donation Median	$10,000
Highest Donation Median	$1 M
#Average Donors / Portfolio	406

Leadership/Mid-Level Gift Officer	
Lowest Donation Median	$1,000
Highest Donation Median	$100,000
# Average Donors / Portfolio	470

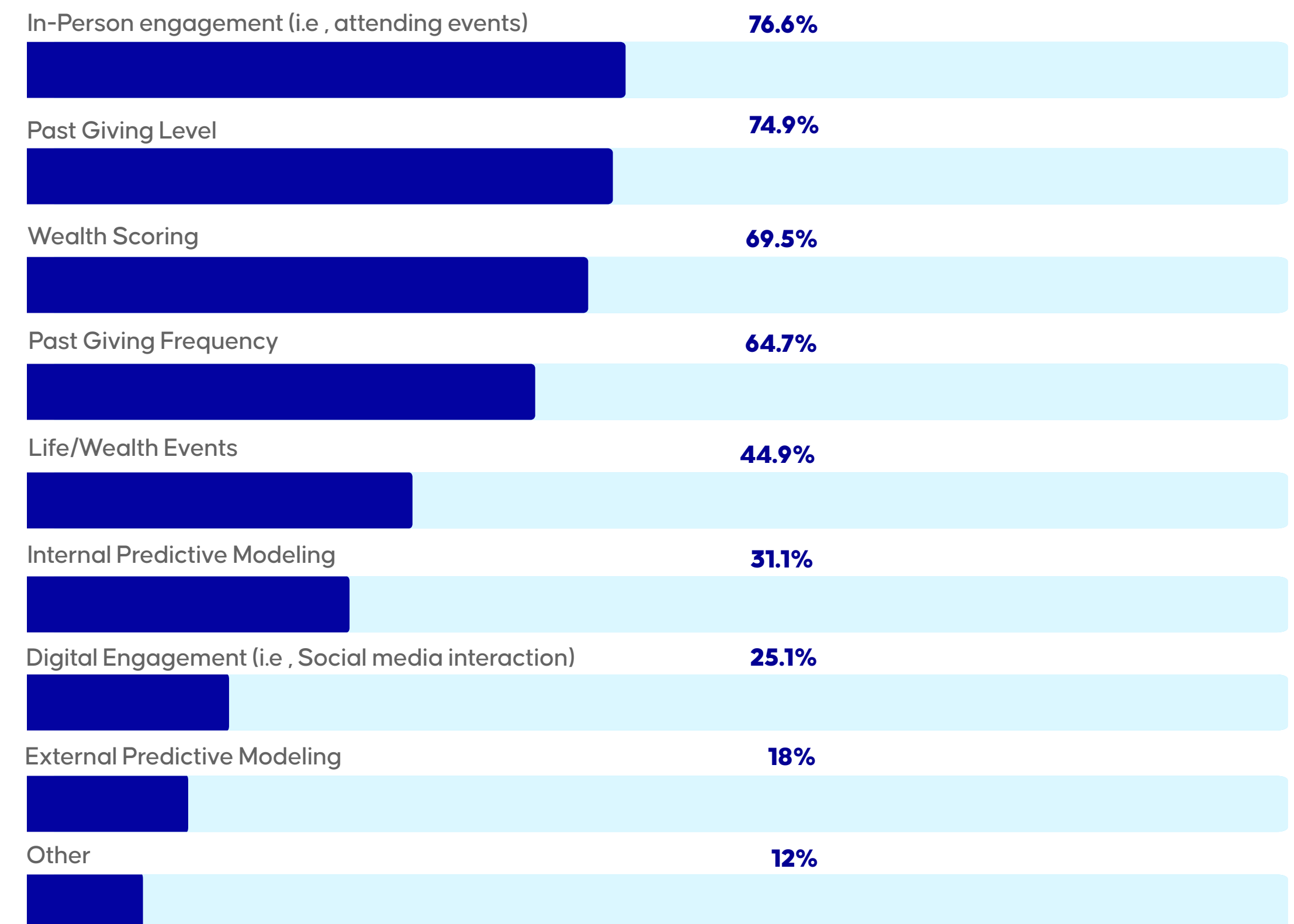| Annual Giving Officer	
Lowest Donation Median	$25
Highest Donation Median	$24,999
# Average Donors / Portfolio	1,161

gravyty

Assigning new donors to portfolios

The majority of fundraisers (67.7%) assign new prospects to a portfolio **at least quarterly.** Nearly one quarter of fundraisers (23%) are doing it monthly, and 13% do it weekly.

Quarterly

31.1%

Monthly

22.8%

Annually

21.6%

Weekly

13.8%

Bi-Annually

10.8%
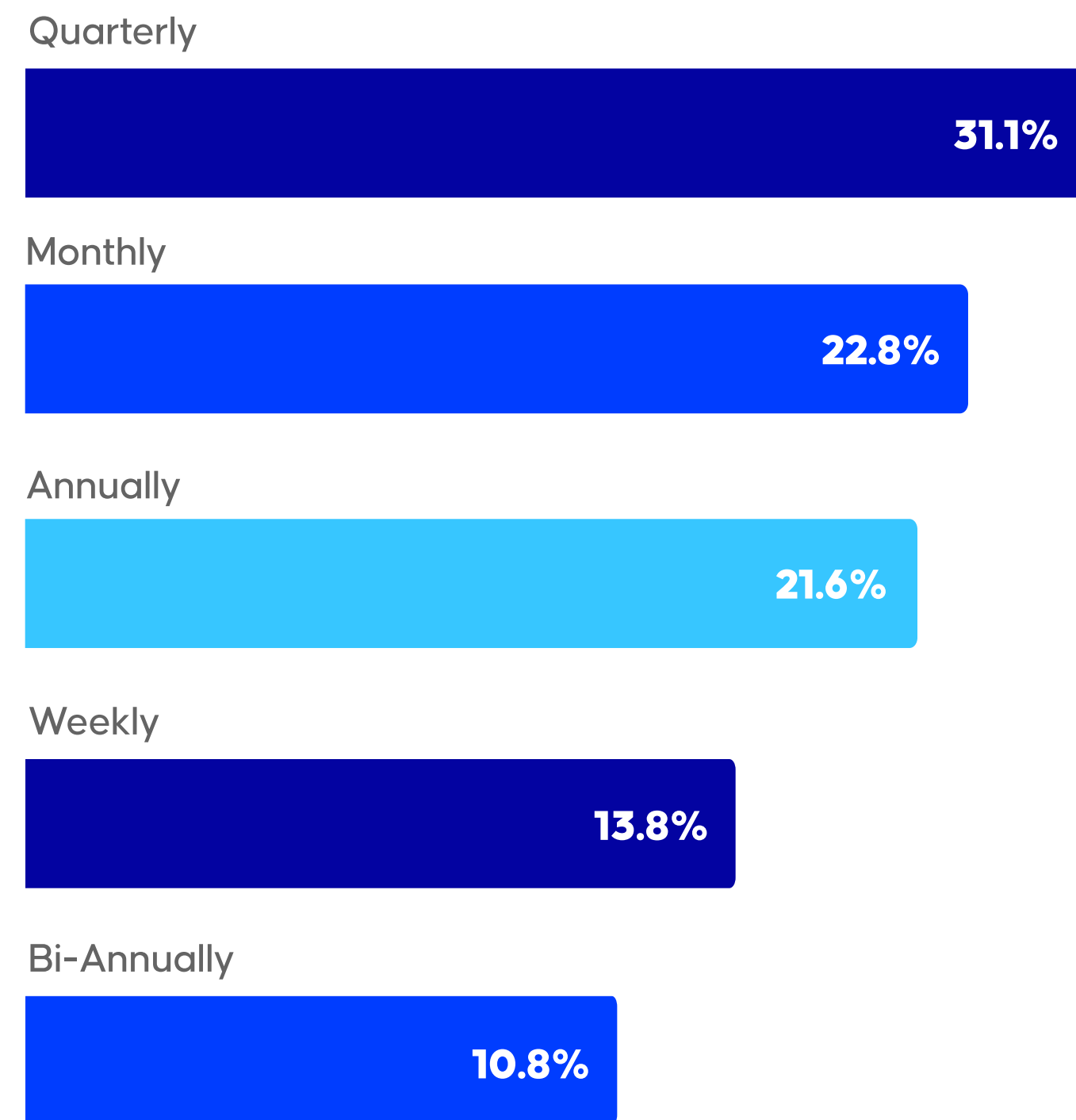
Prospect qualification

76.6% of fundraisers say **in-person events** are the main indicator a prospect is ready to be assigned to a portfolio, closely followed by **past giving level** (74.9%).

In-Person engagement (i.e , attending events)   **76.6%**

Past Giving Level   **74.9%**

Wealth Scoring   **69.5%**

Past Giving Frequency   **64.7%**

Life/Wealth Events   **44.9%**

Internal Predictive Modeling   **31.1%**

Digital Engagement (i.e , Social media interaction)   **25.1%**

External Predictive Modeling   **18%**

Other   **12%**

gravyty

Contact attempts before disqualification

Fundraisers make 3 contact attempts (on average) before removing a prospect from their portfolio.

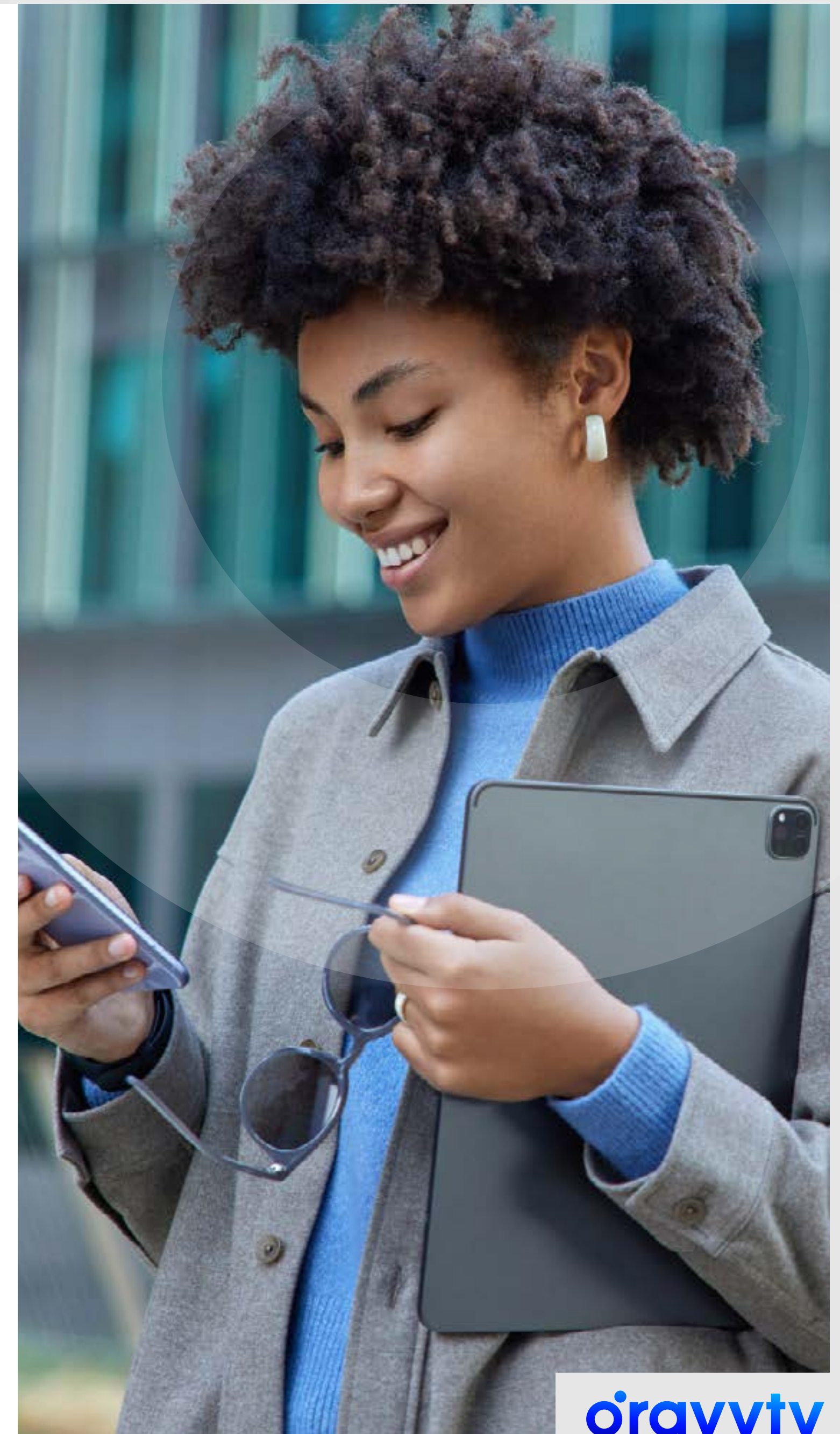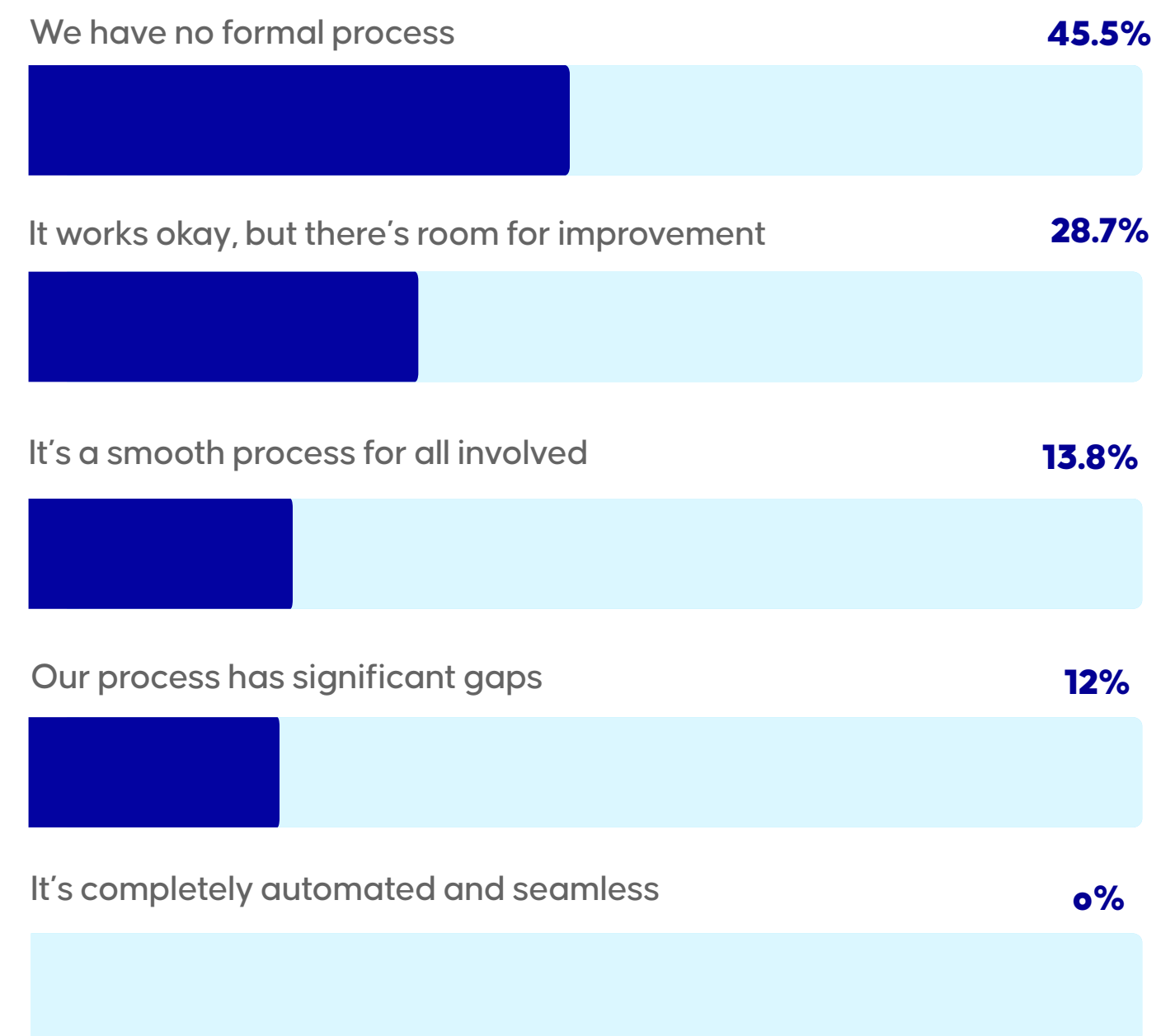|	
We don't have a set number of contact attempts	**55.1%**
10+	**9.6%**
6	**8.4%**
3	**6%**
5	**6%**
4	**4.2%**
7	**4.2%**
9	**1.2%**
1	**0.6%**
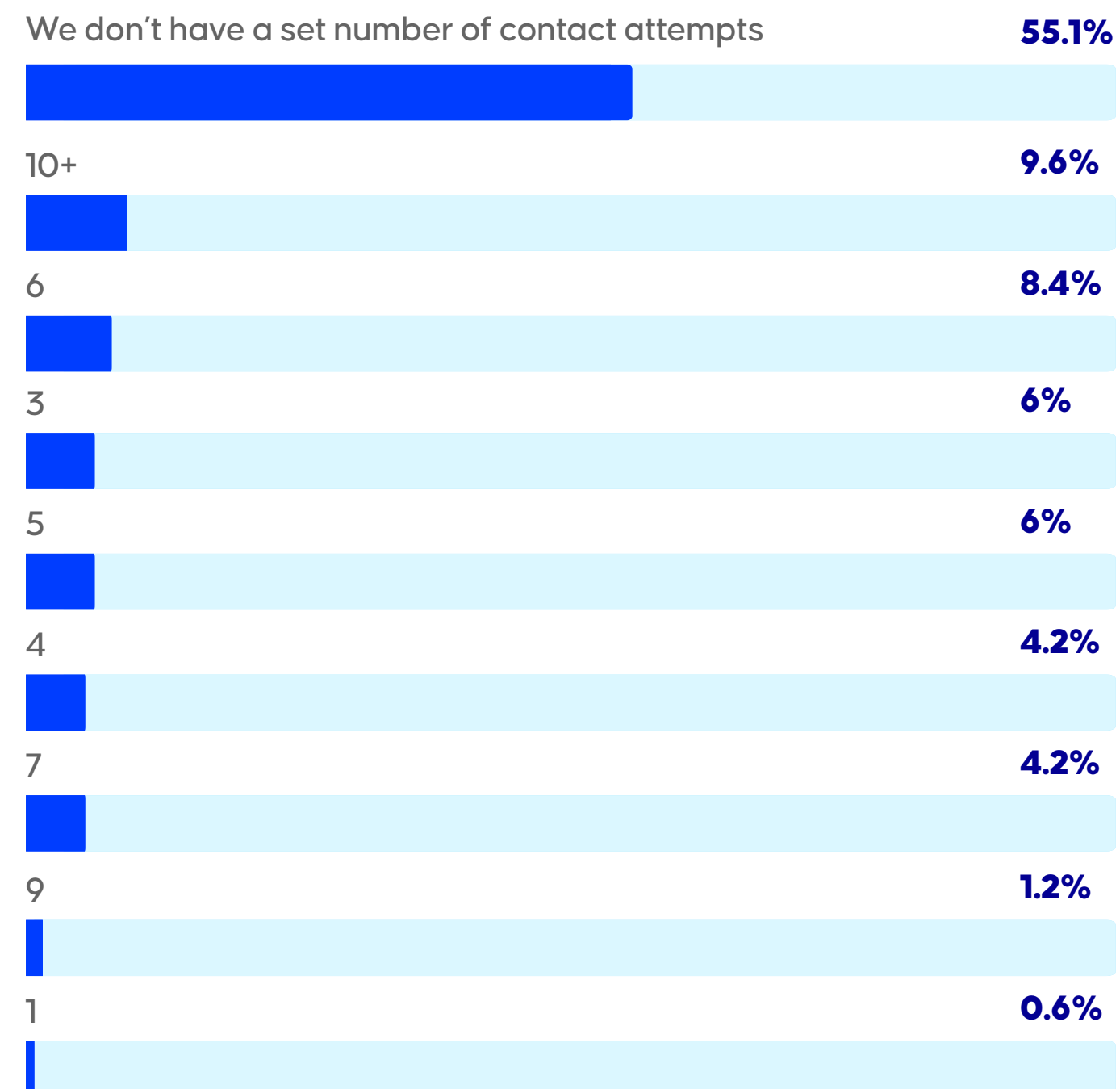
Handoff process

Over half of fundraisers (57.5%) say they have **no formal process or their process has significant gaps** for handing off qualified donors to major gift officers.

We have no formal process	**45.5%**
It works okay, but there's room for improvement	**28.7%**
It's a smooth process for all involved	**13.8%**
Our process has significant gaps	**12%**
It's completely automated and seamless	**0%**

gravyty

2024 Strategies for Success

Looking ahead to 2024, respondents most commonly cited **'improving donor engagement'** and '**enhancing pipeline development and qualification'** as the top strategies to improve pipeline.

Stewardship plan for first-time donors.
Future endowment and expanding the pipeline strategy.
More personal contacts with groups of potential donors.
Converting alumni to volunteers/donors.
Qualification training and implementation.
More accountability around prospect pools.
Leadership annual giving efforts.

84.5% of respondents say that **donor pipeline building** is one of their top priorities.

gravyty

Summary

Each fundraising organization is different, facing unique challenges and taking specific approaches to donor engagement and pipeline development. But tapping into insights from peers can help you prioritize fundraising strategies and measure your success.

The key takeaways from the donor engagement benchmark report to consider as you plan ahead:

> Donor engagement is a top priority to achieve goals in 2024, with fundraisers reaching out to donors an average of 5x per year and tapping into multiple channels like text and video

> The majority of gift officers assign new donors to portfolios quarterly and make at least three contact attempts before removing a prospect from their portfolio

> Staffing, turnover and resource limitations are top challenges fundraising teams are facing

We hope these benchmarks for donor pipeline development and engagement help as you plan for the future and measure against goals.

gravyty

Who is Gravyty?

Gravyty's fundraising platform uses the power of personalization, integrations and AI to provide educational institutions and nonprofit organizations a strong, sustainable donor pipeline—all backed by insights and analytics. Learn more at gravyty.com

Book a consultation

gravyty