RaiseTell

Using the Lapsed Donor Recapture Dashboard

Which lapsed donors to focus on first - and when to ask each one to come back

Dashboard 281 · QX274 - QX277

Three planners, one for each lapse group

Recently Lapsed

1-3 fiscal years since last gift · QX274

Most effort. Your best recapture odds.

Intermediate

4-10 fiscal years · QX275

Be selective - focus on the stronger donors.

Long-Term

11+ fiscal years · QX276

Low-cost reconnection, aimed at former high-value donors.

Repeat donors only
2 or more gifts

Lapsed
no gift for 12+ months

No overlap
each donor is on one planner only

How each donor's ask month is chosen

Does the donor have a Strong or Moderate usual month? → **Yes: ask in their usual giving month**

If not: is there an organization hot month coming up? → **Yes: ask in the next hot month (lift above 1.25)**

Otherwise → **Ask on the anniversary of their last gift**

Begin Outreach = 2 months before the ask month (never earlier than this month)

Hot month

A point after the last gift (for example, 13 months later) when lapsed donors in your own data have come back at least 1.25 times as often as in an average month.

Usual month strength

Strong: 60%+ of giving years, 3+ years

Moderate: 40%+, 2+ years

Weak / None: use a hot month or the anniversary

Six tabs: plan on the Overview, work the planners

Overview

Plan start month, donors per lapse group and how their ask months were chosen.

Recently Lapsed

Planner for 1-3 FYs lapsed. One row per donor, sorted by ask month.

Intermediate LT

Planner for 4-10 FYs lapsed, same columns.

Long-Term

Planner for 11+ FYs lapsed, same columns.

Monthly Plan

Donors to ask in each of the next 12 months, by lapse group and segment.

Recapture Timing

When lapsed donors in your data come back: lift by months since last gift, hot months and a chart.

Each month: size it, reach out, ask, prioritize

1 ► 2 ► 3 ► 4 ► 5

Size the month

On the Monthly Plan, see how many asks fall this month and the next few, by group and segment. Set volume and budget.

Start outreach

On each planner, filter Begin Outreach to this month. Begin contact with these donors now.

Make the asks

Filter Recommended Ask Month to this month. These donors are due for their recapture appeal.

Prioritize

Recently lapsed first. Sort by segment (Top first) or peak FY giving to pick who gets a personal approach.

Hand off

Filter by Assigned Fundraiser to give each their list; unassigned former Top donors are candidates for assignment.

Yellow dropdowns filter and sort every list

Planner filters

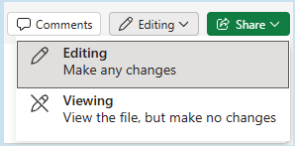
Fundraiser, segment, ask month, outreach month, ask month basis, FYs since last gift, usual giving month, pattern strength, past lapse-and-returns, constituency. (All) clears a filter.

Planner sorts

Ask or outreach month, segment (Top first), pattern strength (Strong first), lifetime net giving, peak FY giving, last gift amount or date - plus every filter field.

Recapture Timing tab: the chart shows, for each number of months since a last gift, how often lapsed donors came back compared with an average month (lift). Above the 1.25 line is a Hot month. Filter to Hot gaps or sort by lift to see when your lapsed donors are most likely to return.

Switch to Editing first. The dropdowns don't work in Viewing mode - change it at the top right of the Excel ribbon.



Keep the plan current and measure results

Watch-outs

- The ask and outreach months are recalculated each time the data refreshes. "Plan starts" on the Overview shows the first month of the 12-month plan - check it so you know which month the lists are planning from.
- Organization timing is a pattern across all lapsed donors, not a promise for one donor - a Strong usual month takes priority.
- Hot months matter most for the recently lapsed; older groups mostly use the donor's own month or the anniversary.

Measures of success

Recapture rate
donors who give again, each month, by lapse group

Recaptured dollars
by month and lapse group

On-time asks
share of asks made in the recommended month