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Welcome to our Webinar

Let's Get Acquainted!

Share in the chat your name, location, and cause or organization, (and the weather in your area)!



onecause® | WEBINAR

Using Actionable Data to Amplify Fundraising Success

& Boost the Joy of Giving



Lee Ernst
Chief Executive Officer
JGA



Thursday, November 14, 2024



Let's Get Started!

What's one way you've put data insights into action this year? Or how has data influenced your decision-making?



Beyond the Webinar

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Meet Our Presenter

Lee Ernst serves as Chief Executive Officer (CEO) and leads new product development and strategic industry partnerships for JGA.

As a Senior Consultant, Lee has demonstrated a keen understanding of the philanthropic landscape and actively shares her deep experience working with donors at large universities and social services organizations with JGA clients.

Before joining the JGA team in 2013, Lee provided counsel as a Development Officer Consultant with the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy.

She previously served as Associate Director at the University of Chicago during the institution's \$2 billion campaign and worked closely with the boards and giving councils to create the inaugural Parents Program fundraising initiative. She began her career at The Salvation Army Divisional Headquarters in Chicago.



Lee Ernst (she/her)

CEO

JGA

Giving is changing. And we need to change as fundraisers.

- Massive growth of Donor-Advised Funds
- Rise of family foundations, giving LLCs, and other vehicles
- Giving circles, collaboratives, and other social giving options
- Growth of GoFundMe and other online, crowdsourced “giving” options

Giving is now more:
*strategic, social,
unmediated,
and impact-driven.*

And:
*They're avoiding
fundraisers.*

How Cause Adoption is Changing

- Donors look to peers for validation of a cause, then look for an organization to help further it.
- Donors have individual, unique, and personal strategies for giving, which combines money, volunteering, and their influence.
- This means that tracking engagement from donors is crucial. We can no longer rely on capacity alone.

And:

Fundraisers must move to adapt.

New data tools and strategies can help.

The Old Way

LOYALTY

RELATIONSHIP

NETWORK

IMPACT

The New Way

IMPACT

NETWORK

RELATIONSHIP

LOYALTY

Two Key Questions We Need to Answer with Today's Donors

*who to
engage*



*how to
engage*

Why Engagement Matters

It's about engagement, and data lets you follow it.

- Engagement-first fundraising is taking over a solicitation-driven approach.
- Alumni who use career services are an additional 3x+ more likely to give.
- Event attenders and volunteers are 2–3x more likely to give.
- Engagement, like volunteering, clicking, following on social media, is a great way to provide focus for your outreach.
- We have this data at (or just beyond) our fingertips as fundraisers.

60%

of new fundraising positions include the word “engagement” in the title or description.

Sources: CASE, RNL, HigherEdJobs, and CareerNorth

Who to Engage

Key data that powers nonprofit fundraising success

Capacity

- Donors who seem able to make transformative gifts

Giving

- Detecting individuals who are charitable to other organizations

Engagement

- Who is most interested, involved, and responding to you today



It's about more than just wealth screening.
Data must be actionable for your team, and combine
engagement, readiness, and capacity.

Building ROI and Staff Coverage Models for Strategic Growth

Reshapes your portfolios to focus your major gift efforts on your best prospects

Analysis Level	Total Names	Estimated Capacity	Combined Capacity	Under Management
Donors and Engagers	246	\$25,000+	\$45,115,505	145
Donors	531	\$100,000+	\$213,875,383	111
	1,595	\$25,000 - \$99,999	\$65,575,299	118
Engagers	63	25,000+	\$1,885,440	7
Total	2,435		\$326,451,627	381

Sample Donor Coverage and ROI Analysis

From this data, assumptions can be made around how many people can be visited.

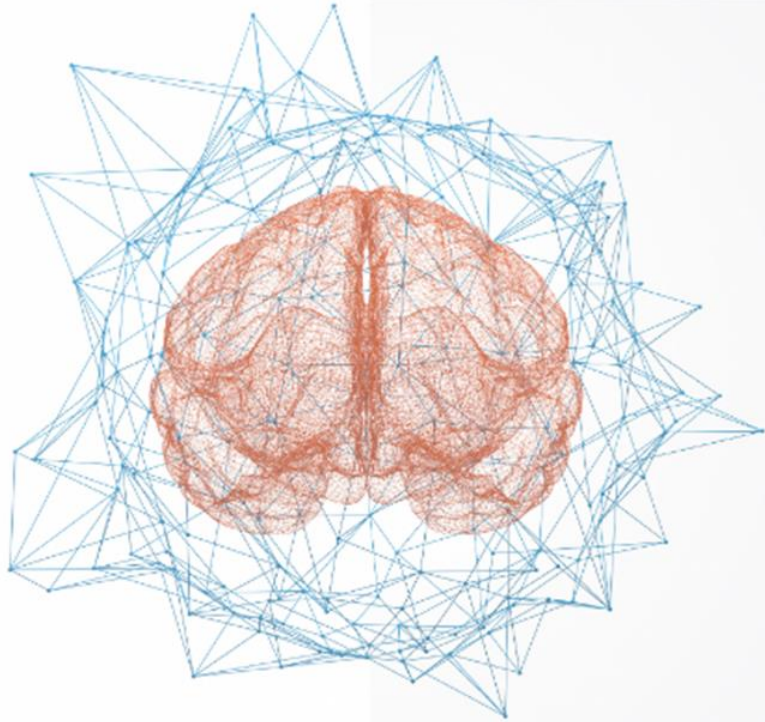
In this example, a total of 1,525 people and approximately 3,000 visits would be needed over 5 years to move the relationships forward.

Staff Coverage Analysis

- Current staff could conduct around 1,750 visits and engage 855 people from this pool, potentially resulting in around \$13M in support.
- That left a gap of almost 700 people that were still highly rated but would not receive a visit and could result in approximately another \$5M in support.



Donors Expect a Personal Experience



*how to
engage*

How Personas Can be Used

- **Marketing and Communications**
Tailoring messages based on the donor persona
- **Major and Leadership Gifts**
Put yourself in the donor's mindset before you call, meet, and engage
- **Annual Giving and Appeals**
Vary messaging and choose your audience
- **Starting Slow**
Incremental change is the key to transforming your fundraising

Personas can be based on:

- Demographics
- Behavioral Data
- Engagement
- Psychographic Data
- Surveys
- Conversations

The best combine multiple of these things.



ChatGPT Example: Based on a Donor Persona

Write an appeal to a donor for annual support to Lambda Chi Alpha, focused on...

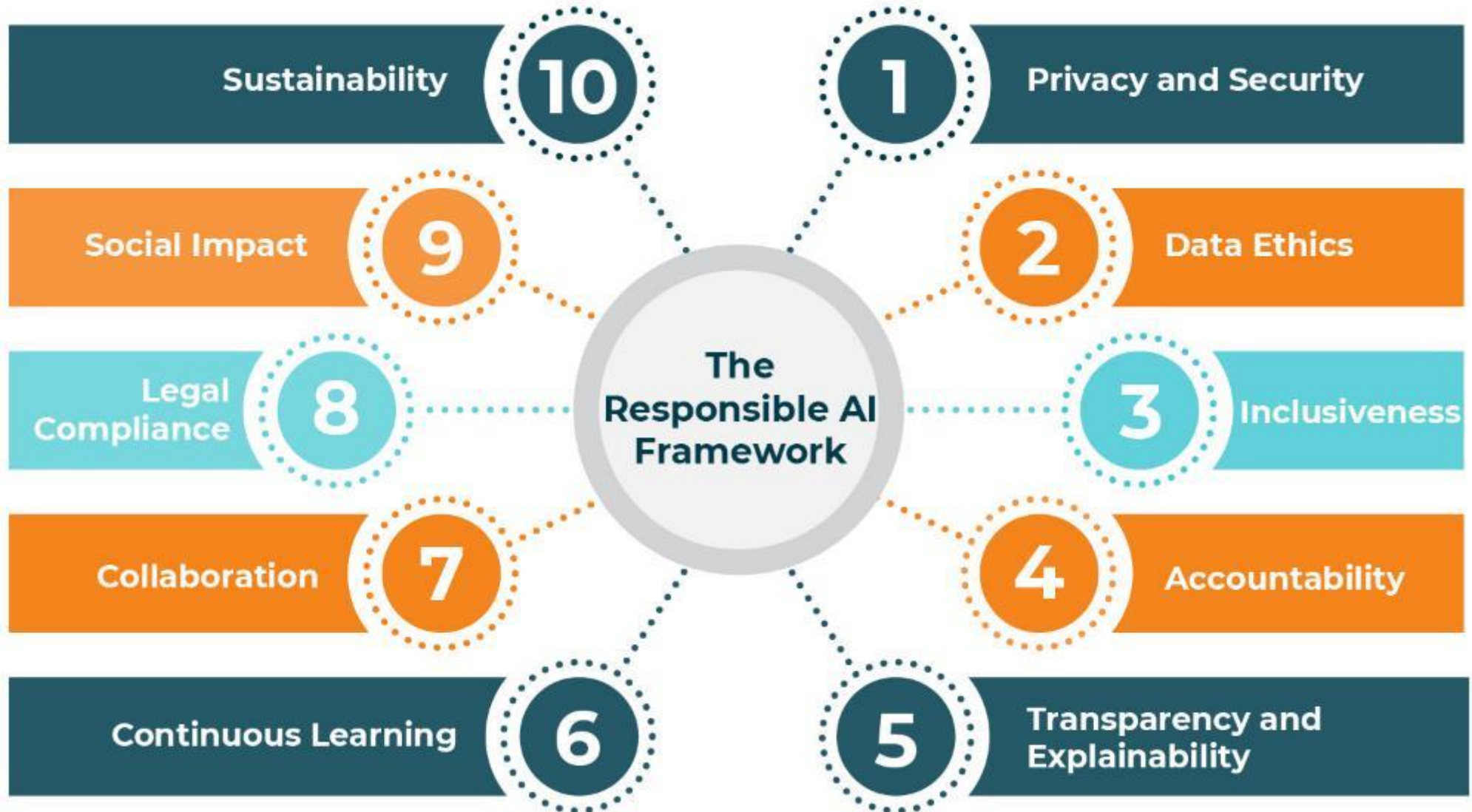
• Collaboration

“Dear [Donor's Name], as a dedicated member of Lambda Chi Alpha, your partnership is vital in our **shared mission** to uphold our values and enrich the lives of our brothers. Together, our contributions make it possible to fund scholarships, leadership programs, and preserve the strength of our chapter. By renewing your gift, you **join a collective effort** to foster brotherhood, leadership, and service in our community.”

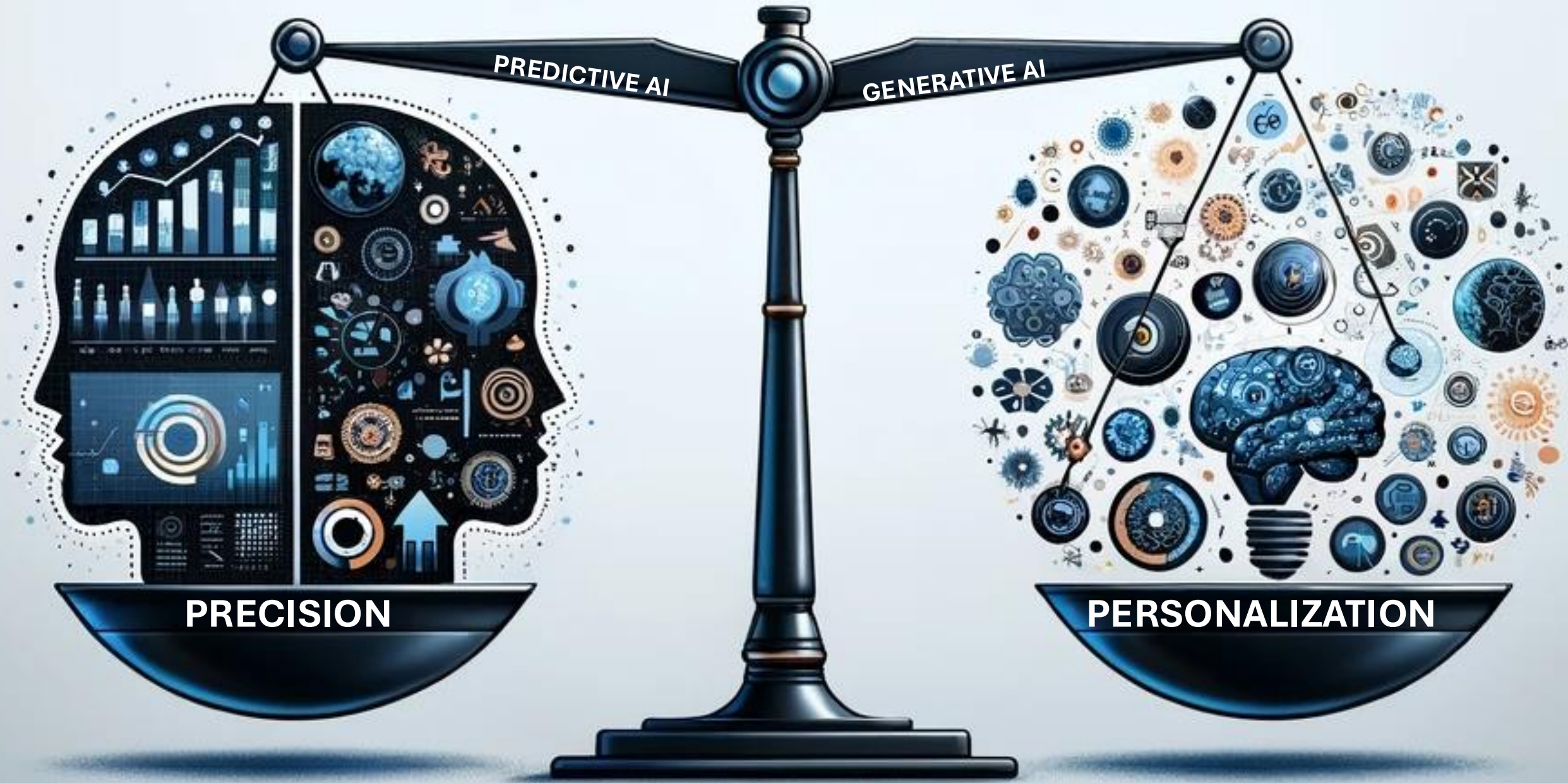
• Innovation

“Dear [Donor's Name], as a valued member of Lambda Chi Alpha, your ongoing support **empowers us to innovate and advance our mission** of enriching the lives of our brothers. This year, your annual contribution is key to funding cutting-edge leadership programs, scholarships, and initiatives that keep our chapter at **the forefront of excellence**. Please consider renewing your gift to help us continue driving positive change and fostering the next generation of leaders.”

Responsible AI Framework – www.fundraising.ai



AI POWERED PRECISION PHILANTHROPY



A background image showing a group of business professionals in an office setting. They are gathered around a table, looking at a tablet computer. One person is holding a smartphone, and another is holding a coffee cup. The scene is brightly lit, suggesting a modern office environment.

Q+A Discussion

Upcoming Webinars

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“This was one of the best webinars that I’ve attended. I love that it was super practical and not sales-pitchy!!”

“Thank you for sharing a ton of invaluable information today. I am writing a report to share with my team!”

“This was seriously one of the best webinars that I have attended. It was relevant, packed with great information, lots of energy, and lots of great questions from the attendees.”



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hello@onecause.com | onecause.com