



Raise
2020

WE'RE GOING VIRTUAL

2 Days of Online Learning & Networking

SEPTEMBER 14-15, 2020

Inspire. Connect. Grow.
SEP 16-17, 2019 | CHICAGO, IL

#2019Raise

The background features a blue-tinted collage of various people's faces, mostly smiling. Overlaid on this are several thin, yellow, wavy lines that create a sense of movement and flow across the image.

Raise
2020

Making Donor Love Out of Nothing At All

WELCOME

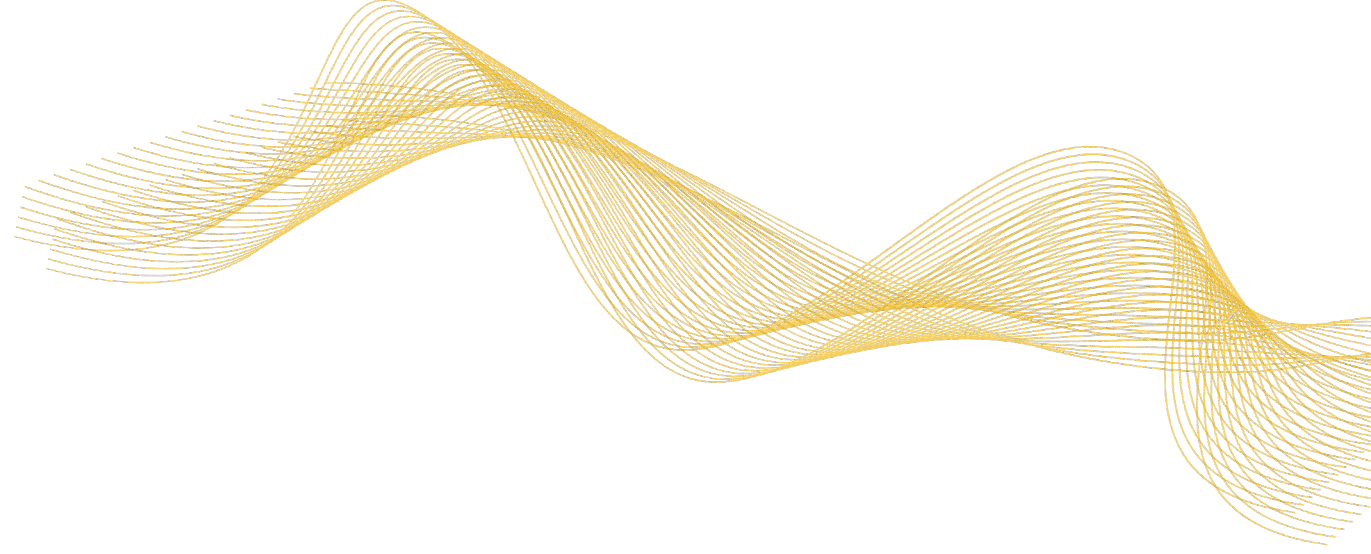


T. Clay Buck, CFRE

Founder & Chief Strategist
Tactical Fundraising Solutions

Raise
2020

Agenda



1. What Is Donor Love?
2. Why do we need it?
3. How do we achieve it?
4. One Thing We Can Do Now
5. Q&A Discussion

What IS Donor Love?

And is it even important?





Donor Love

1. Make the Donor the Hero*
2. Share Amazing and Inspiring Stories
3. Connect to your Donor's Values and Emotions
4. Falling – and Staying – in Love
5. Ask for One Thing
6. Who (or What) is the Right Voice for your Story?
7. Say Thanks With Passion

Courtesy Agents of Good – www.agentsofgood.org

*We need to talk about this . . .

*The Donor As Hero

- Fundraising in our Current Reality
- Community-Centered Fundraising
 - All who engage in strengthening the community are equally valued, whether volunteer, staff, donor, or board member
 - We treat donors as partners, and this means that we are transparent, assume the best intentions, and occasionally have difficult conversations
- Donor Dominance & Inequity in Giving/Fundraising
 - We Together vs. Us/Them, "Other"

Showing Donor Love

- 1) Thank You Early & Often
- 2) Report How \$ Used
- 3) More “You/Community” than “Us/Org”
- 4) Integrated, Multi-Channel, Ongoing Communications
- 5) Personalized, Clean, Segmented Data



Why Donor Love?

48%

Average Donor Renewal Rate
From the Fundraising Effectiveness Project
afpfep.org

The Donor Love Priority List

- 1) Know where you ARE
- 2) Determine where you're GOING
- 3) Focus on the PRIORITIES
- 4) Stop chasing the NEW/SHINY
- 5) Find great STORIES
- 6) Put GRATITUDE first
- 7) Be DONOR-CENTERED*



GOOD
VIBES
ONLY



Know Where You *ARE*

- Data & History
- Reality – not assumptions
- It might sting a little (sorry)

The Life-Changing, Mind-Blowing, Fund-Raising, Awesome Power of the Database Audit


Total Number Records:	12,061		
Total Number Donors:	9,162	Total # Gifts:	26,267
Total \$ Donations:	\$68,741,096	Average Gift:	\$7,503
Blank Address:	1,661 (14%)		
Invalid ZIP	1,747 (15%)		
Blank Home Phone:	10,137 (87%)		
Blank Business Phone:	8,740 (75%)		
Blank Email:	9,353 (78%)		

The Life-Changing, Mind-Blowing, Fund-Raising, Awesome Power of the Database Audit

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Revenue	\$88,956	\$469,061	\$676,792	\$1,068,792	\$719,432	\$535,110	\$450,160	\$231,178	\$185,100	\$22,086
# Gifts	2,978	14,367	19,554	31,182	18,259	14,932	11,757	4,868	4,299	498
# Donors	2,971	13,245	16,649	25,569	14,994	12,291	9,073	4,364	3,059	382
Gifts/Donor	1.00	1.08	1.17	1.22	1.22	1.21	1.30	1.12	1.41	1.30
Average Gift	\$30	\$33	\$35	\$34	\$39	\$36	\$38	\$47	\$43	\$44
Median Gift	\$25	\$25	\$25	\$25	\$25	\$25	\$25	\$25	\$25	\$35
# Renewed		991	4,386	6,284	6,939	4,536	3,931	2,557	1,201	289
Renewal Rate		7%	26%	25%	46%	37%	43%	59%	39%	76%
# New	2,971	12,254	12,263	19,285	8,055	7,755	5,142	1,807	1,858	93

Compounding Data Quality

	Year 1	Year 2	Year 3	Year 4	Year 5
Total # of Records	25,000	25,000	25,000	25,000	25,000
Total \$ Donated	\$1,100,000	\$1,000,000	\$990,000	\$1,100,000	\$1,000,000
Average Constituent Value	\$44	\$40	\$40	\$44	\$40
Hygiene Issues (1% record loss)	250	250	250	250	250
		500	750	1,000	1,250
Dollars Lost	\$11,000	\$20,000	\$29,700	\$44,000	\$50,000



“All the great copywriting...all the donor care imaginable...and all the brilliant strategies in the world don’t matter if the donor no longer receives your communications.”

ROGER CRAVER, *THE AGITATOR*

<https://agitator.thedonorvoice.com/premature-exoneration/>

Determine Where You're *Going*

- Budget
- Organizational Goals
- Set the Plan/Work the Plan
(based on data)



Development Plan

ACME Nonprofit
2018 Fundraising Goals Worksheet
June 20, 2018

Overall Fundraising Goal: \$2,000,000

Strategic Focus: [What is the topmost fundraising priority, e.g. # of donors, donor retention, acquisition, etc.]

Funding Focus						Budget Goal		Opportunities		Plan	
Annual/Individual Giving						\$750,000		- not getting new donors		- research/identify acquitistion streams	
								- retention rate 47%		- increase communications	
								- Low Board engagement		- recruit board champion	
								- low average gift		- create upgrade offers	
Special Events						\$350,000		- Opportunity 1		- Plan for Opportunity 1	
								- Opportunity 2		- Plan for Opportunity 2	
								- Opportunity 3		- Plan for Opportunity 3	
								- Opportunity 4		- Plan for Opportunity 4	
Corporate/Foundation Giving						\$400,000		- Opportunity 1		- Plan for Opportunity 1	
								- Opportunity 2		- Plan for Opportunity 2	
								- Opportunity 3		- Plan for Opportunity 3	
								- Opportunity 4		- Plan for Opportunity 4	
State/Federal Grants						\$500,000		- Opportunity 1		- Plan for Opportunity 1	
								- Opportunity 2		- Plan for Opportunity 2	
								- Opportunity 3		- Plan for Opportunity 3	
								- Opportunity 4		- Plan for Opportunity 4	

Development Plan

	GOALS	CAMPAIGN STRATEGY	DATES/TIMELINE	STATUS & NOTES
Individual/Annual Giving - INCREASE COMMUNITY ENGAGEMENT AND NUMBER OF DONORS SUPPORTING UNRESTRICTED INCOME				
	Increase # of Individual Donors	Quarterly direct mail acquisition & SYBUNT; monthly renewal of current/LYBUNT. Bi-annual newsletter. Support w/ ongoing digital reminders.	Feb/May/Aug/Nov	Set data segments for each appeal. Curating stories/case. Developing focus.
	Major Donor Identification	Wealth screen current & lapsed. Identify higher scores. Create portfolio for high touch.	Q1 - February	Data pulled; sent to vendor. Identifying current MG for continued cultivation.
	Digital/Social	Increase social media engagement. Google Ads.	Ongoing	Focus on FB, Twitter, Insta. Ad grant submitted
Corporate & Foundation - ENGAGE AND MAINTAIN STRATEGIC RELATIONSHIPS WITH KEY CORPORATE & FOUNDATION ENTITIES				
	Identify current corporate partners.	Review event sponsorship history. Update contact info.	January	Complete
	Identify corporate/foundation prospects.	Identify prospect list of potential/desired corporate and foundation partners; set individual strategy for each and map relationships for acces/ongoing discussion.	August/September	Preliminary list started. Review and list/target all current relationships, proposals and outstanding requeusts.
Special Events - PRODUCE RELEVANT EVENTS THAT INCREASE BRAND AWARENESS AND GENERATE SIGNIFICANT UNRESTRICTED INCOME				
	Gala	Increase visibility w/in community and create a "signature" event that really drives mission and awareness.	April, 2019	Finalize sponsorship. Update auction items.
	Golf Tournament	Confirm location. Set sponsorship offers.	October, 2019	Date confirmed. Players contract. Sponsorship under review.
	Cause Marketing	Identify key partners for community events.	Ongoing	List developed. One event per quarter.

Development Plan

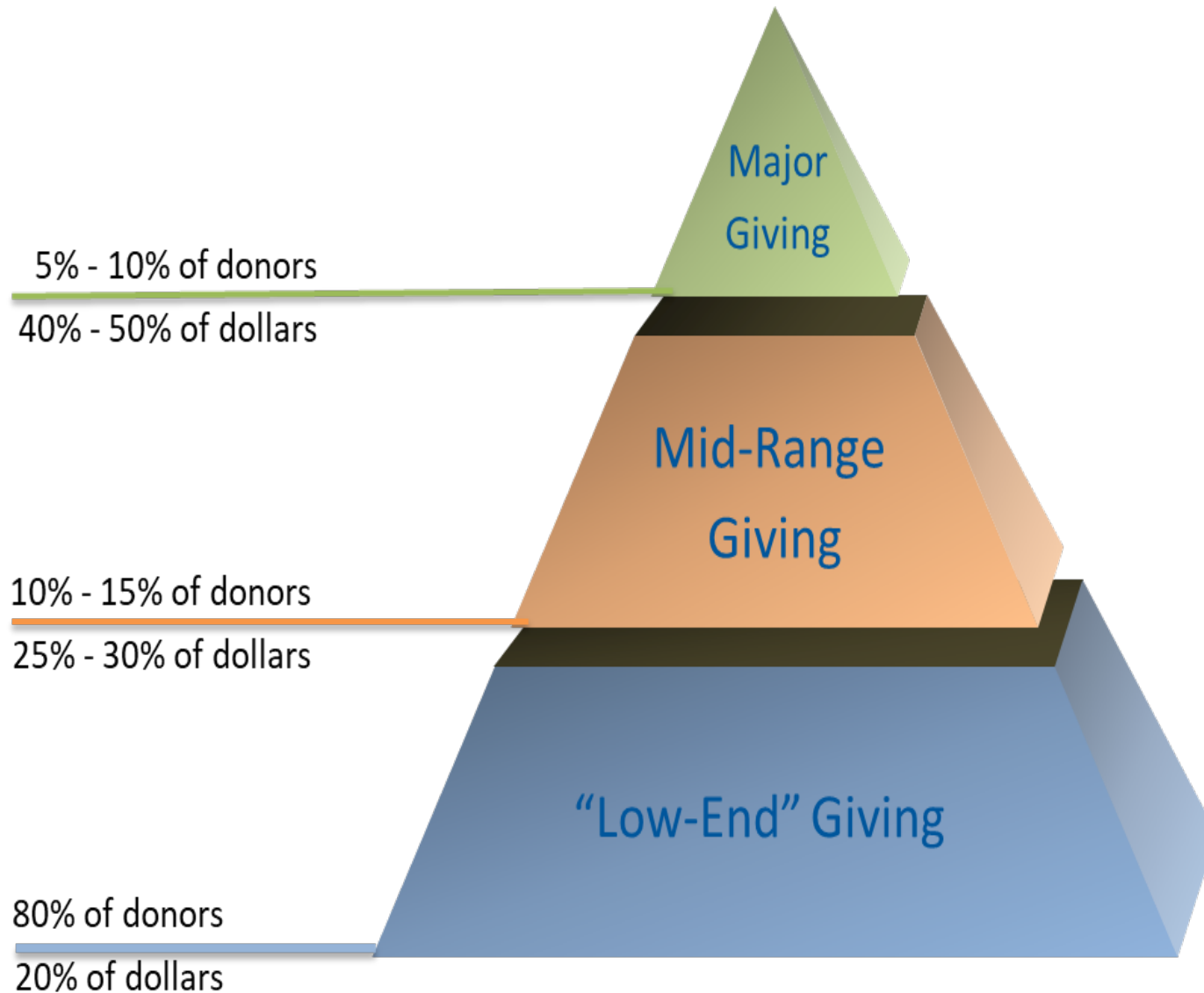
	GOALS	CAMPAIGN STRATEGY	DATES/TIMELINE	STATUS & NOTES
Grants - ENGAGE & MAINTAIN CONSTRUCTIVE RELATIONSHIPS WITH LOCAL & GOVERNMENT GRANTORS SUPPORTING PROGRAMS & MISSION				
	Local/State/Federal grants	Continuous evaluation of grant cycles and need for programming funding. Evaluate grants that need to be replaced, re-focused or dropped completely.	Ongoing	<ul style="list-style-type: none"> - Monthly meeting for grants/programs review established. - Move grant reporting to CRM from Gantt chart
	Funding Needs	Develop ongoing list of funding opportunities and needs e.g. "wishlist"	Ongoing	<ul style="list-style-type: none"> - Meet w/ program teams/site visits.
Marketing/Comms - DEVELOP COMMUNICATIONS STRATEGIES THAT ELEVATE BRAND RECOGNITION & ENGAGE THE COMMUNITY				
	Website Re-Design	Re-design/structure website to better tell our story, engage prospective members & the community and encourage donations	May	Final wireframe content due asap on giving pages, planned giving, etc.
	Define and refine messaging	Develop marketing and communications materials that clearly define organizational mission focusing on core messaging of programs & service. Print/digital/social drafts for 12-month calendar.	Ongoing	<ul style="list-style-type: none"> - Draft revision of one-sheet in review - Board social "takeover" in process - Elevator pitch w/ committee for review
Dev/Mktg Infrastructure - ESTABLISH SYSTEMS & INFRASTRUCTURE THAT SUPPORT GOALS & ENCOURAGE REVENUE GENERATION				
	Strengthen database and data assets	Review CRM functionality and conduct data audit to determine areas of greatest need and current status.	Ongoing - table for higher priorities	<ul style="list-style-type: none"> - Invest in ongoing CRM training on more complex issues - Soliciting quotes for data clean project
	Acknowledgement/Receipts	Restructure acknowledgement/receipt process for more expedient. Develop comprehensive stewardship plan.	High Priority	<ul style="list-style-type: none"> - All letters re-drafted & loaded to CRM - Reviewing GL entries/coding - Re-training all staff on gift entry

Focus On *Priorities*

- Is this getting you TO GOAL?
- Is it Supported by Data?
- Can you change Direction?
- Not just budget - DEVELOPMENT



80/20 “Pareto” Principle



THE 20%

Major Gifts and higher-level mid-range. (Your Board should fall in this range.)

THE 80%

Mid-range and entry level, low-end giving. (We need a better name than “Low-End.”)

Campaign Gift Chart

	Number of Gifts Required	Cumulative Gifts Required	Number of Prospects Required	Cumulative Prospects	Total Dollars for Category	Cumulative Dollars
\$10,000	18	18	72	4	\$180,000	\$180,000
\$7,500	22	40	88	160	\$165,000	\$345,000
\$5,000	29	69	116	276	\$145,000	\$490,000
\$3,000	35	104	140	416	\$105,000	\$595,000
\$2,500	44	148	176	592	\$110,000	\$705,000
\$1,500	50	198	250	842	\$75,000	\$780,000
\$1,000	65	263	390	1232	\$65,000	\$845,000
\$500	100	363	800	2,032	\$50,000	\$895,000
\$250	200	563	1,600	3,632	\$50,000	\$945,000
\$100	250	813	2,500	6,132	\$25,000	\$970,000
\$50	350	1,163	3,500	9,632	\$17,500	\$987,500
\$25	500	1,663	5,000	14,632	\$12,500	\$1,000,000
TOTAL	1,663		14,632		\$1,000,000	

Campaign Gift Chart

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\$3,000	35	104	140	416	\$105,000	\$595,000
\$2,500	44	148	176	592	\$110,000	\$705,000
\$1,500	50	198	250	842	\$75,000	\$780,000
\$1,000	65	263	390	1232	\$65,000	\$845,000
\$500	100	363	800	2,032	\$50,000	\$895,000
\$250	200	563	1,600	3,632	\$50,000	\$945,000
\$100	250	813	2,500	6,132	\$25,000	\$970,000
\$50	350	1,163	3,500	9,632	\$17,500	\$987,500
\$25	500	1,663	5,000	14,632	\$12,500	\$1,000,000
TOTAL	1,663		14,632		\$1,000,000	

Prospect Ranking

ID#	Amount	Amount	Status	Probability
1234	Jack Spratt	\$100,000.00	Prospect	75%
5678	Mary Q. Contrary	\$50,000.00	Renewal	100%
91011	John J. J. Schmitt	\$10,000.00	Renewal	100%
121314	Bobbi Socks	\$10,000.00	Prospect	50%
151617	Anna Graham	\$5,000.00	Donor	75%
181920	Barbara Seville	\$5,000.00	Renewal	50%
212223	Douglass Furr	\$1,000.00	Donor	100%
242526	Frank N. Stein	\$1,000.00	Lapsed	100%
272829	Marsha Dimes	\$500.00	Renewal	100%
303132	Pearl E. Gates	\$250.00	Lapsed	100%
333435	Justin Howles	\$250.00	Lapsed	50%
363738	Laurel N. Hardy	\$100.00	Renewal	100%

Focus on the Priorities

Gift Range	Number of Gifts Required	Cumulative Gifts Required	Number of Prospects Required	Cumulative Prospects	Total Dollars for Category	Cumulative Dollars
\$100,000	2	2	8	8	\$200,000	\$200,000
\$50,000	3	5	12	20	\$150,000	\$350,000
\$25,000	7	12	28	48	\$175,000	\$525,000
\$10,000	17	29	68	116	\$170,000	\$695,000
TOTAL	29		116		\$695,000	

ID#	Amount	Amount	Status	Probability
1234	Jack Spratt	\$100,000.00	Prospect	75%
5678	Mary Q. Contrary	\$50,000.00	Renewal	100%
91011	John J. J. Schmitt	\$10,000.00	Renewal	100%
121314	Bobbi Socks	\$10,000.00	Prospect	50%

Total High Level Prospects with 75%+ probability = 122

Total High Level Prospects amount = \$840,000



Focus on the Priorities

Gift Range	Number of Gifts Required	Cumulative Gifts Required	Number of Prospects Required	Total Dollars for Category
\$5,000	25	54	125	\$125,000
\$2,500	30	84	150	\$75,000
\$1,000	40	124	280	\$40,000
TOTAL	95		555	\$240,000

ID#	Amount	Amount	Status	Probability
151617	Anna Graham	\$5,000.00	Donor	75%
181920	Barbara Seville	\$5,000.00	Renewal	50%
212223	Douglass Furr	\$1,000.00	Donor	100%
242526	Frank N. Stein	\$1,000.00	Lapsed	100%

Total Mid-Range Prospects with 75%+ probability = 486

Total Mid-Range Prospects amount = \$180,000



Hard Truths?

Donor Retention isn't
ALWAYS our #1 Concern

Major Gifts aren't *ALWAYS*
our Greatest Need





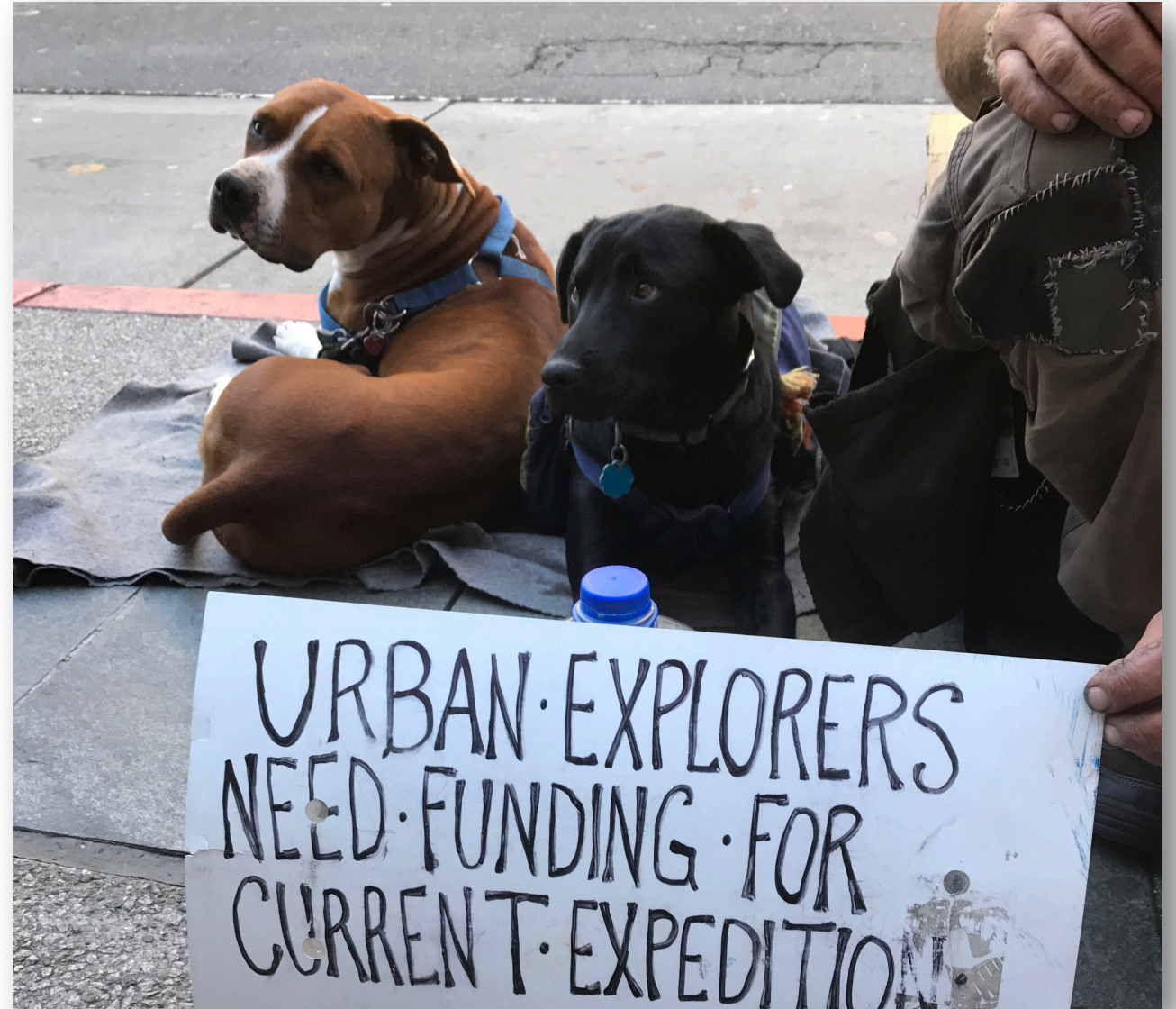
Stop Chasing the New/Shiny

- **Can You Manage It?**
 - Do you have the infrastructure/time/resources to support one more thing?
- **Does It Fit?**
 - Is it crucial to your plan or is it a search for an Easy Button?

Find – and Tell – Great Stories

Attend fewer meetings.

Talk to more beneficiaries.



We Are Wired for Story



<https://www.awesomestories.com/asset/view/Your-Brain-on-Story-The-Brain-Science-Behind-AwesomeStories>

Every Nonprofit Exists to Solve a PROBLEM

Every PROBLEM needs
a SOLUTION

Every DONOR wants to
be a part of that
SOLUTION



A person with long brown hair, seen from behind, is holding a large white sign with a black border. The sign has the text "GIVE. THANKS." written on it in bold, black, sans-serif capital letters. The person is wearing a dark blue jacket and blue jeans. The background is a blurred green field with trees in the distance.

**GIVE.
THANKS.**

Put Gratitude First

Are you really grateful to that donor?

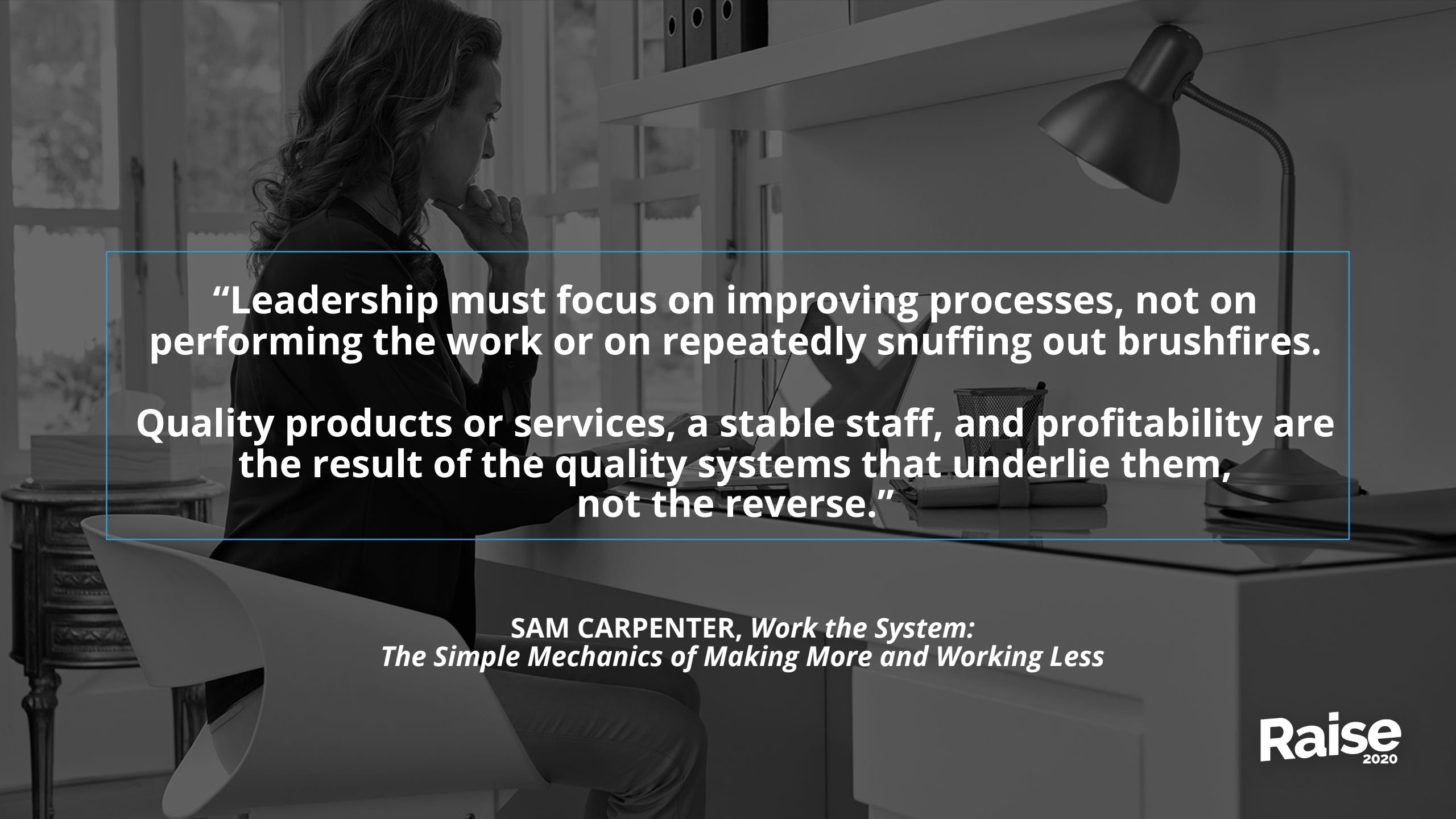
Really?

Is everyone?

Gratitude, like everything else, is a process.

The Donor Gratitude Journey

TIME SINCE GIFT	ACTION	PROCESS	RESPONSIBILITY	SEGMENT
1 Day	Email TY	Auto-Generate	Dev Staff	ALL
48 Hours	TY Letter Receipt	Receipting Variable for sub-segment	Gift Entry	ALL with Address Sub-segment by recency.
48 Hours	Personal Email/Receipt	Receipting Variable for sub-segment	Gift Entry	ALL with Email Only Sub-segment by recency.
48 Hours - 1 Week	TY Calls	List generated at gift entry	Lead Dev Staff	\$250+
48 Hours - 1 Week	CDO TY Calls	List generated at gift entry	CDO	\$500+
48 Hours - 1 Week	CEO TY Calls	List generated at gift entry	CEO	\$1,000+
1 Week	Handwritten TY Notes	List generated at gift entry	Dev Staff	ALL with Address
2 Weeks - 1 Month	TY Video/Update	Create story bank	Digital Mktg	ALL with email
2 Months	CEO Update Email/Ltr	Create bank; update	Dev Staff	ALL
3 Months	Variable Ask	Offer based on giving - upgrade, 2nd Ask, Recurring	Dev Staff	ALL
4 Months	Other Engagement	Offer volunteering, program tour, event, etc.	Dev Staff	ALL
5 Months	Update/Newsletter	Subscription streams	Dev Staff/Digital Mktg	ALL
6 Months	Impact Update	Program updates, gift accomplishment, etc.	Dev Staff/Program Staff	ALL
7 Months	Soft Renewal/Upgrade Ask	Determined by segment	Dev Staff	Determine by sub-segment
8 Months	Impact Update	Program updates, gift accomplishment, etc.	Dev Staff/Program Staff	ALL
9 Months	Donor Survey	Engagement Level	Dev Staff/Digital Mktg	ALL
10 Months	Renewal/Upgrade Ask	Determined by segment	Dev Staff	ALL
11 Months	Impact Update	Program updates, gift accomplishment, etc.	Dev Staff/Program Staff	ALL
12 Months	Renewal/Upgrade Ask	Determined by segment	Dev Staff	ALL



“Leadership must focus on improving processes, not on performing the work or on repeatedly snuffing out brushfires. Quality products or services, a stable staff, and profitability are the result of the quality systems that underlie them, not the reverse.”

**SAM CARPENTER, *Work the System:
The Simple Mechanics of Making More and Working Less***

A woman with dark hair, wearing a black headset with a microphone, is looking at a laptop screen. She is wearing a dark blue shirt with white polka dots. Her hands are raised in a gesturing motion. The background is a blurred office setting. The image is split diagonally by a blue shape on the left side, which contains text and a logo. Yellow wavy lines are in the top left corner.

QUESTIONS?

Now's my time to
hear from you!

Raise
2020

FOLLOW US ON SOCIAL

#2020RAISE



fb.com/onecause



@onecauseteam



@onecauseteam

Raise
2020



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Session Ratings

Don't forget to rate each session!

VISIT SOCIO APP