

# Responsive Fundraising:

*Build Lasting **Donor Relationships** & Increase **Donor Loyalty**  
In Today's Distraction-Filled World*

**MARCH 11 | 1PM ET | 12PM CT 10AM PT**

# Session Hosts



Kelly Velasquez-Hague  
VP of Content  
Marketing  
OneCause



Noah Barnett  
Director of Partnerships  
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RESEARCH

# The Growing Gap Between Today's Donor & Today's Nonprofit



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# Today we'll cover:

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- 1) A Generosity Crisis
- 2) Today's Donor: What They Want From You
- 3) 3 Approaches To Donor Segmentation
- 4) Responsive Cultivation Strategies & Examples
- 5) Questions & Discussions



# NOAH BARNETT

- Husband & father to 3 sons
- Curious. Discontent. Hopeful.
- Working with nonprofits for 10 years
- Spent 7 years running growth and fundraising at various nonprofits
- Now, the Director of Partnerships & Community at Virtuous



# We are the responsive nonprofit's growth partner.

We equip nonprofits with:

- An integrated CRM, communications, and giving **platform** built by fundraisers for fundraisers.
- A modern fundraising **playbook** designed to build lasting relationships with today's donor.
- Hands-on support and on-going insights delivered by real **people** who deeply care about your success.



Learn more at [VirtuousCRM.com](https://VirtuousCRM.com)

# The Responsive CRM & Fundraising Platform

One Conversation. Multiple Channels. Better Relationships.



## Responsive CRM Software

Increase giving with the new generation of nonprofit CRM that moves you simply “managing” donors to building meaningful relationships with ALL your constituents.

- ✓ Predictive data-analytics
- ✓ Insight rich reporting
- ✓ Social & email integration



## Communications Platform

Cultivate relationships with every donor like they are a major donor. Automate communication in each donor’s journey to respond to donor signals in real-time.

- ✓ Marketing automation
- ✓ Email marketing
- ✓ Campaign builder



## Online Giving Experience

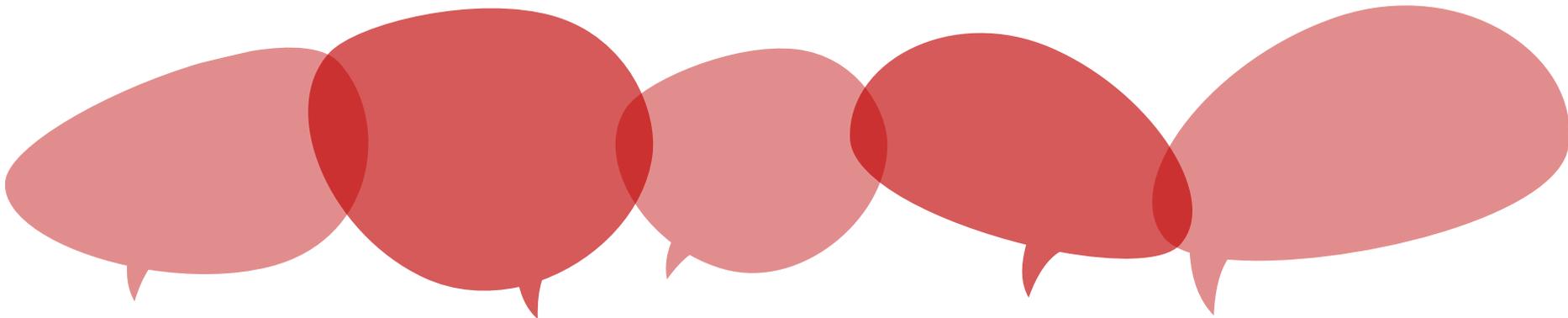
Create frictionless giving experiences and open a line of communication with donors using custom giving forms and lead forms fully integrated into your website.

- ✓ Flexible giving forms
- ✓ Donor portals
- ✓ Prospect/email forms





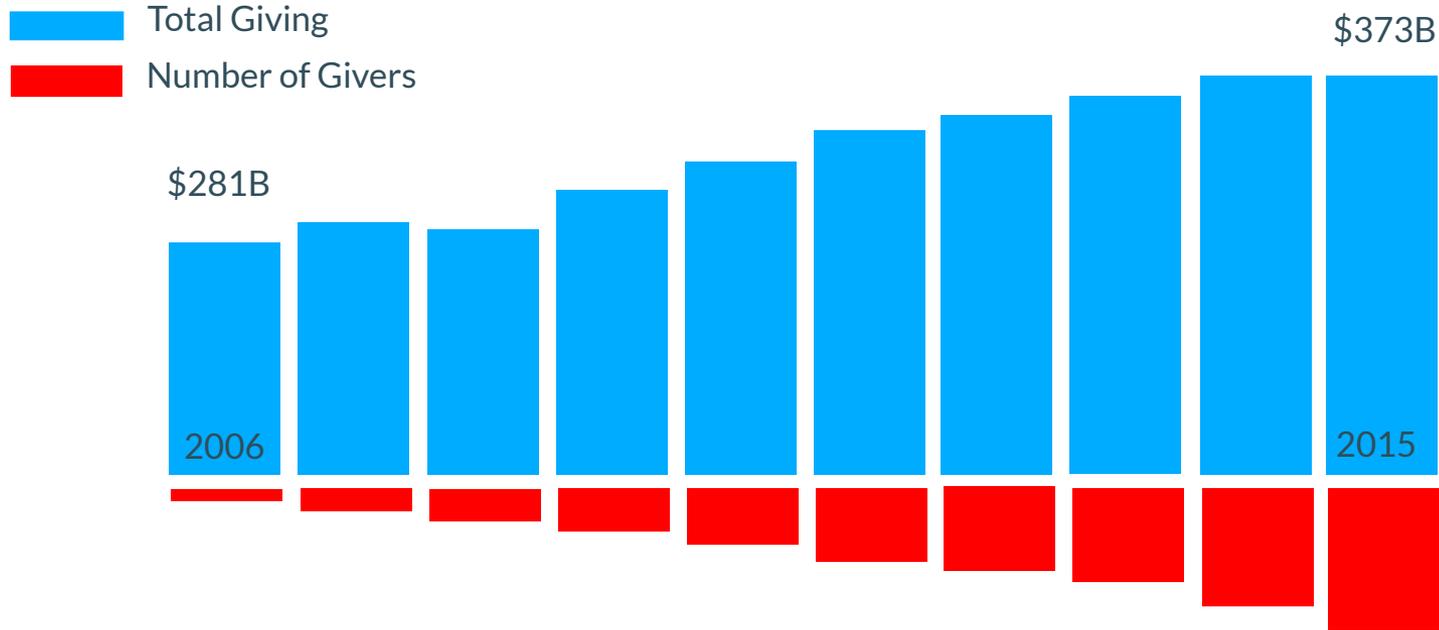
## The reality?



Today's nonprofit struggles to retain and cultivate today's donor.

Each year, nonprofits **lose more than half of their donors** and **76% of new donors**.

# 18% drop in the number of donors from 2006-2015



*This massive problem is hidden because major donors are filling the gap*

25% drop  
in low to mid-tier donors  

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in the last decade

POLL QUESTION:

**What was your nonprofit's donor retention rate last year?**

- Below 50%
- Between 50-75%
- Above 75%

# Key Insight

The fundraising models that drive most nonprofits were designed for *a donor that no longer exists.*

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# 3 foundational shifts in our world ...

Access to information has been democratized, shifting power from institutions to individuals.

Technology is transforming all aspects of our lives, especially how we connect with people and brands

Attention is fractured and endless distractions compete for our time resulting in message fatigue.

# Technology has drastically changed how your donors communicate, connect and learn



## Today's donors...

- Are hyper-connected and rely on recommendations by friends.
- Want to be PART of your causes... not just an ATM.
- Expect personalized experiences across all areas of their lives



# Personalization Everywhere

audible 



Disney



STITCH FIX



NETFLIX





# When donors ...

## Stop Giving

- Inappropriate asks & impersonal messages
- Lacking acknowledgement & limited transparency
- Poor & unhelpful communication

## Continue Giving

- Personalized attention & support
- Accessible & kept informed about impact
- Quick responses and helpful communication

# Discovery #1

Today's donor expects a personal connection to causes they care about most.

## Discovery #2

Yet, today's nonprofit is handcuffed to outdated fundraising tactics that reserve this for a select few.

And, rely on impersonal, unresponsive tactics that bundle the majority of donors in “mass”.



KEY INSIGHT

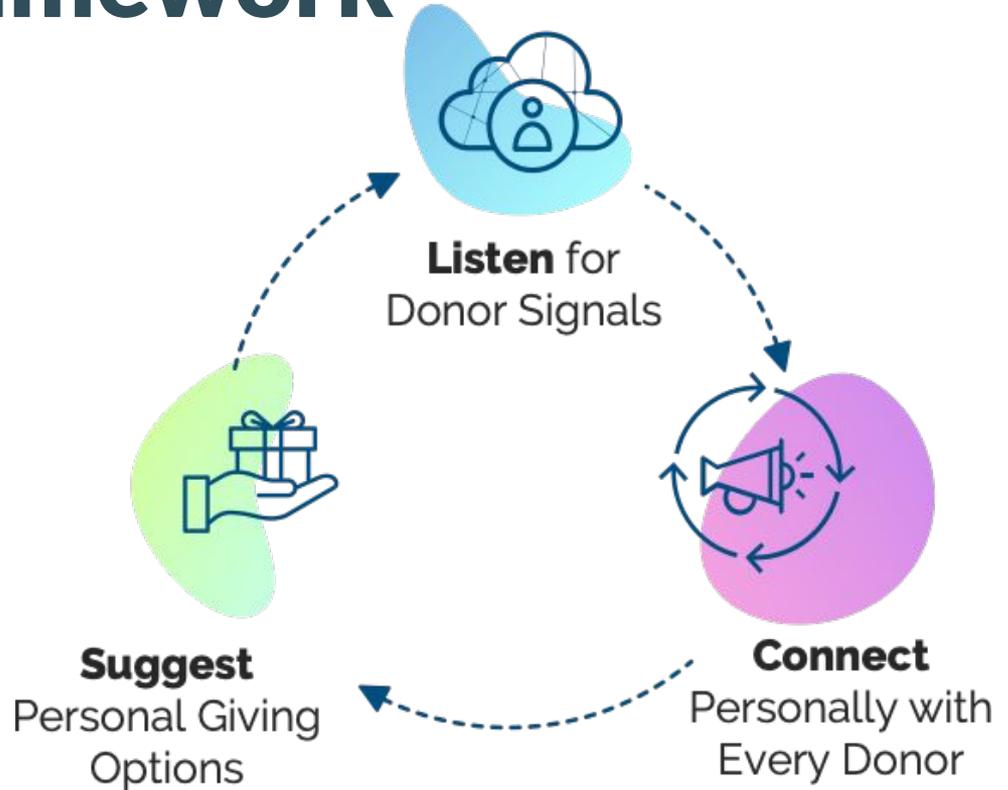
**You need a refreshed  
approach to fundraising.**

# The Responsive Fundraising Framework

Puts your **DONOR** at the center of fundraising

Treats **ALL** donors like major donors

Personalized cycles **NOT** impersonal funnels



# Responsive Fundraising uses modern technology to foster genuine conversations and create personalized engagement for every donor.



NOW

Everyone receives personal engagement

Development Teams, Communications, Phone Calls, 1-1 Meetings, Personalized Emails, Mailings, Text Messages



# Questions

Let's dive in!

Share yours in the Q&A window.



RESPONSIVE FUNDRAISING

# 3 Types of Donor Signals Your Nonprofit Should Be Listening For





## SEGMENTATION STRATEGY #1

# Segment by involvement

All giving is personal. However, segmentation by involvement frequency and giving levels can help you pinpoint your messaging to serve donors better.

Segment ideas:

- Donors vs. non-donors
- Advocates (volunteers, fundraisers)
- First-time vs. return donors
- Everyday vs. high-value donors
- Recurring donors



## SEGMENTATION STRATEGY #2

# Segment by interest

Each of your donors give first because they care. You should use this to provide contextual suggestions to donors on how they can get involved with your fundraising campaigns.

Segment ideas:

- Support program A vs. program B
- Attended an event, but hasn't given
- Gave at year-end last year vs. not



## SEGMENTATION STRATEGY #3

# Segment by intent

Go beyond RFM analysis and giving history, seek to understand why a donor cares and then group donors by motivation. This lets you hyper-personalize your message to mirror the donor's motivation.

Segment ideas:

- Group by 2-4 different motivations
- Those that benefit vs. those that support



POLL QUESTION:

# How do you segment your donors?

- By involvement only
- By involvement + interest
- All three!
- Not at all ... we're working on it!



RESPONSIVE FUNDRAISING

# Responsive Fundraising Strategies for Donor Cultivation



## RESPONSIVE CULTIVATION #1

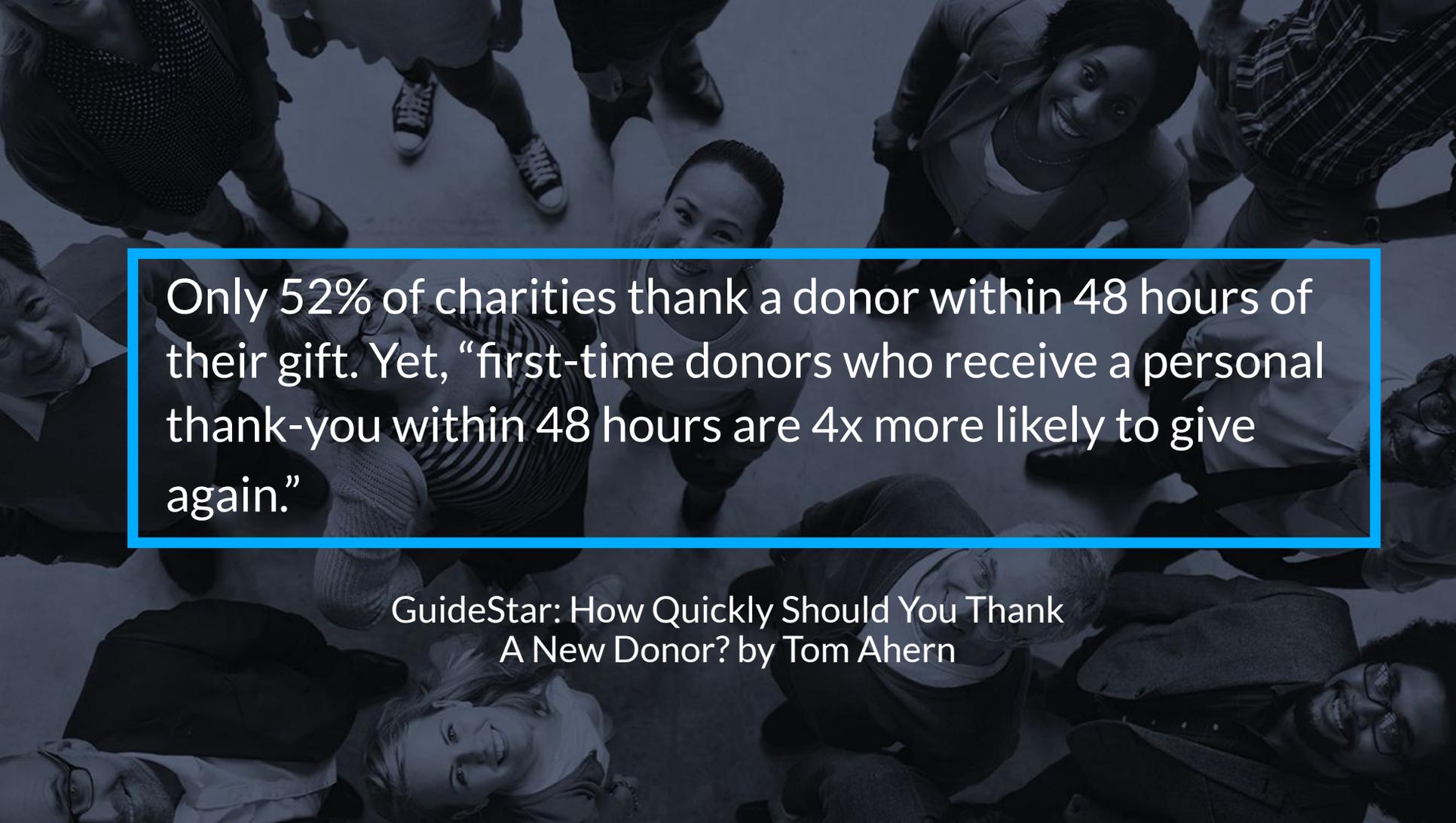
# Maximize momentum

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After someone makes a donation to your fundraising campaign, it's important that you begin cultivation immediately. You also shouldn't shy away from suggesting next steps.

Sample follow-up email series:

- Day 1: Thank you + watch an impact video
- Day 3: Thank again + suggest they invite 3 others to support the cause.
- Day 10: Acknowledge their commitment + ask for a monthly gift to extend investment in 2020.



Only 52% of charities thank a donor within 48 hours of their gift. Yet, “first-time donors who receive a personal thank-you within 48 hours are 4x more likely to give again.”

GuideStar: How Quickly Should You Thank  
A New Donor? by Tom Ahern

## RESPONSIVE CULTIVATION #2

# Dynamic vs. fixed nurturing

Reorient your year-end cultivation to focus less on drop dates and more on each individual donor journey.

Each series should be focused on moving a donor to the next step of engagement (i.e. engage with campaign, make a donation, etc.).

- First time donors vs. return supporters
- GivingTuesday donors vs. other December donors
- Advocacy or peer-to-peer donors



# New Donor Thank You

Dashboard / Marketing Automation / New Donor Thank You

ACTIONS ▾

ADD A STEP +

## NONDONORS

Query: [DLC - Nondonors](#)

DONORS 1073

ACTIONS 1

Find a donor in this step...

Stephanie Hutton [↗](#)  
251 South Planck Boulevard  
Woodhaven, NY 11421

Troy Decker [↗](#)  
3540 E Jackson Point # 107  
South Richmond Hill, NY 11419

Bertha Salas [↗](#)  
5520 West Archer Place  
West Linn, OR 97068  
(880) 568-5456

Yvonne Patton [↗](#)  
761 NE Ventura Creek # 136  
Annandale, VA 22003  
ypatton915@comcast.com  
(718) 825-2124

Francisco and Laurie Bock [↗](#)  
6941 N Upsala Loop  
Satellite Beach, FL 32937  
(828) 857-1823

Sister Arlene Hoang [↗](#)  
PO Box 110  
Abingdon, MD 21009  
a\_hoang1014@icloud.com

## FIRST-TIME DONOR

Query: [DLC - First-time Donor](#)

DONORS 5

ACTIONS 7

- Add Tag: First-time Donor
- Remove Tag: Nondonor
- Follow: Development Rep Owner
- Task: Welcome & thank you call
- Task: Search for social profiles
- Delay 3 days
- New Donor Welcome Email #1
- Delay 5 days
- New Donor Welcome Email #2
- Delay 3 days
- Follow-up call
- Delay 21 days
- New Donor Welcome Email #3

ADD AN ACTION +

## MAJOR DONOR

Query: [DLC - Major Donor](#)

DONORS 826

ACTIONS 4

Find a donor in this step...

Courtney and Eric Frantz [↗](#)  
5259 North Spring Blvd Suite 172  
Merrick, NY 11566  
c\_frantz820@amazon.com  
602-999-1234

Alberto and Ann Waters [↗](#)  
4168 S Tobin Way  
Fairburn, GA 30213  
(331) 873-4222

Albert and Connie Huff [↗](#)  
1817 N 9th Expressway  
Potomac, MD 20854

Mr. Ralph Heredia [↗](#)  
2212 NW Gayle Way  
Rosenberg, TX 77471  
ralphheredia@yahoo.com

Marsha Booker [↗](#)  
3914 East Pecos Rd  
Merrimack, NH 03054  
mbooker716@gmail.com

Miss Eleanor Hammer [↗](#)  
5447 E Innovation Highway  
Rosedale, NY 11422

Help



“Targeting donors on a 1:1 level increases response rates up to 50% or more.”

NP Source: 2018 Fundraising Stats Report

## RESPONSIVE CULTIVATION #3

# Contextual suggestions

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Brands like Netflix, Spotify, Amazon, Nike, and even Disney Theme parks are listening closely to your behaviors and preferences so they can make personalized (relevant, timely, appropriate) suggestions. You should too!

- See what happens. Watch the video >>
- Read Joanne's story
- Gift a gift of \$\_\_\_\_\_ (based on capacity) to XYZ
- Invite 3 friends to watch the video
- Attend a digital brief on XYZ issue
- Create a peer-to-peer fundraising page



“Poor personalization and lack of trust cost U.S. organizations \$756 billion last year, as 41 percent of consumers switched companies.”

Accenture Strategy: U.S. Consumer Digital  
Trust Deficit Report

## RESPONSIVE CULTIVATION #4

# Be human in messaging

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With trust in institutions continuing to decline, and the knowledge that giving is deeply personal, it's important to bring a “humanness” to your fundraising.

- Write like you talk
- Communicate from a second-person
- Tap into plain text emails, handwritten notes, and personal phone calls
- Get others involved: non-fundraising staff, board members, key donors, and partners

## Research Question

What motivates donors to give a donation?

## Design

### C: Control

<< Test First Name >>,

God has primarily chosen to reach people through people. The Bible says in Romans, "How can they hear about Him unless someone tells them?" You and I are called and commissioned to tell them.

But here's what I want people to understand: **sharing the gospel is not a duty to be dreaded—it is a privilege to be enjoyed.** In fact, leading someone to Jesus is about the greatest joy there is, this side of heaven.

Let me help you get excited about sharing your faith. My book *Tell Someone* will be sent to you in thanks for a [donation of any amount](#) to Harvest Ministries this month. If you already have a copy, I challenge you to give one to a friend.

Included with *Tell Someone* is a bonus DVD of a message I recently gave called "Evangelism, Jesus Style." Let's experience the joy of sharing Jesus with others!

Greg



### T1: Urgency

<< Test First Name >>,

God has primarily chosen to reach people through people. The Bible says in Romans, "How can they hear about Him unless someone tells them?" You and I are called and commissioned to tell them.

But here's what I want people to understand: **sharing the gospel is not a duty to be dreaded—it is a privilege to be enjoyed.** In fact, leading someone to Jesus is about the greatest joy there is, this side of heaven.

Let me help you get excited about sharing your faith. My book *Tell Someone* will be sent to you in thanks for a donation of any amount to Harvest Ministries this month. If you already have a copy, I challenge you to give one to a friend.

But, I wanted to be sure you took advantage of this offer before we no longer offer it. This offer is only available through the end of the month.

Included with *Tell Someone* is a bonus DVD of a message I recently gave called "Evangelism, Jesus Style." Let's experience the joy of sharing Jesus with others!

Time is running out, [get this resource now](#) before it's too late.

Greg



## T2: Personal

Hi country,

I hope this finds you well.

I'm sure you have come to realize this by now, but one of my biggest passions in life is to see people come to know Jesus Christ as their Lord and Savior.

I know how God has primarily chosen to reach people through people to do this work. The Bible says in Romans, "How can they hear about Him unless someone tells them?" You and I are called and commissioned to tell people about Christ!

But here's what I want you to understand: sharing the gospel is not a duty to be dreaded—it is a privilege to be enjoyed. In fact, leading someone to Jesus is about the greatest joy there is, this side of heaven.

Have you ever experienced that?

I want to help you get excited about sharing your faith. My book, "Iai Someone" will be sent to you in thanks for a donation of any amount to Harvest Ministries this month. If you already have a copy, I challenge you to give one to a friend.

Included with "Iai Someone" is a bonus DVD of a message I recently gave called "Evangelism, Jesus Style." Let's experience the joy of sharing Jesus with others!

Here's a link to get your book now:  
<http://www.harvest.org/iai-someone-book>

Have a great rest of your week.

Orag

## Results

Treatment Name	Conv. Rate	Relative Difference	Confidence
C: <a href="#">Control</a>	0.07%		
T1: <a href="#">Urgency</a>	0.10%	36.3%	80.5%
T2: <a href="#">Personal</a>	0.16%	116.3%	100.0%

This experiment has a required sample size of 17,568 in order to be valid. Since the experiment had a total sample size of 123,249, and the level of confidence is above 95% the experiment results are valid.

## Flux Metrics Affected

The Flux Metrics analyze the three primary metrics that affect revenue (traffic, conversion rate, and average gift). This experiment produced the following results:



0% increase in traffic

× 116.3% increase in conversion rate

× 18.9% decrease in average gift

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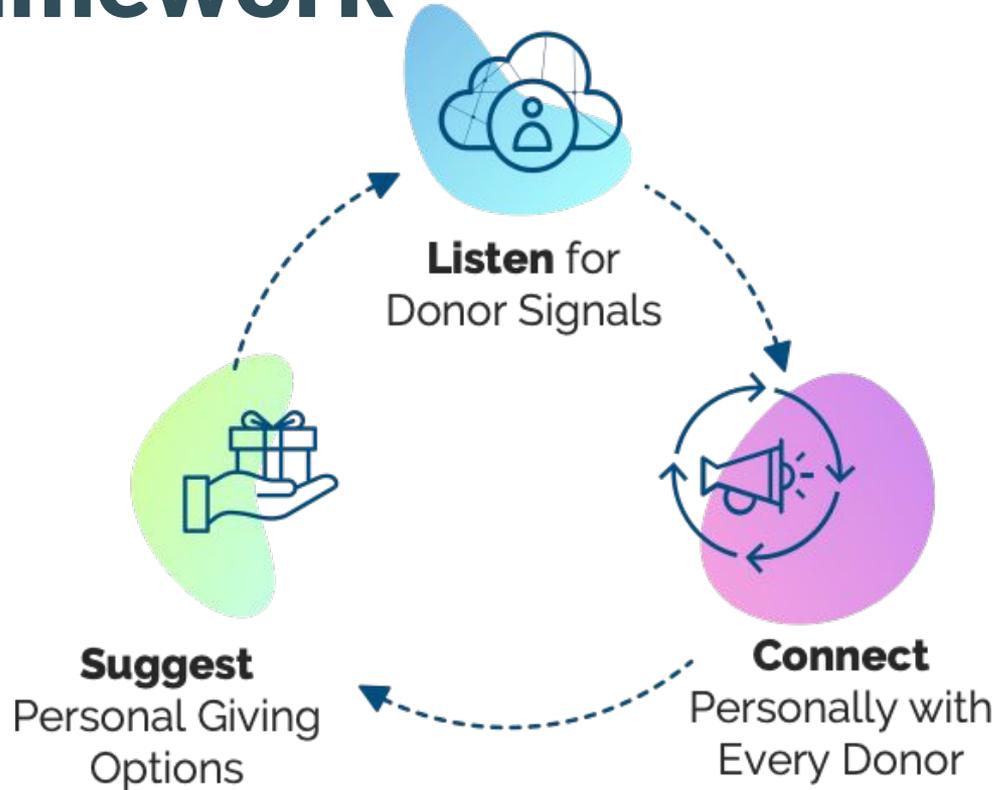
75.4% increase in revenue

# The Responsive Fundraising Framework

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Treats **ALL** donors like major donors

Personalized cycles **NOT** impersonal funnels



# Key takeaways:

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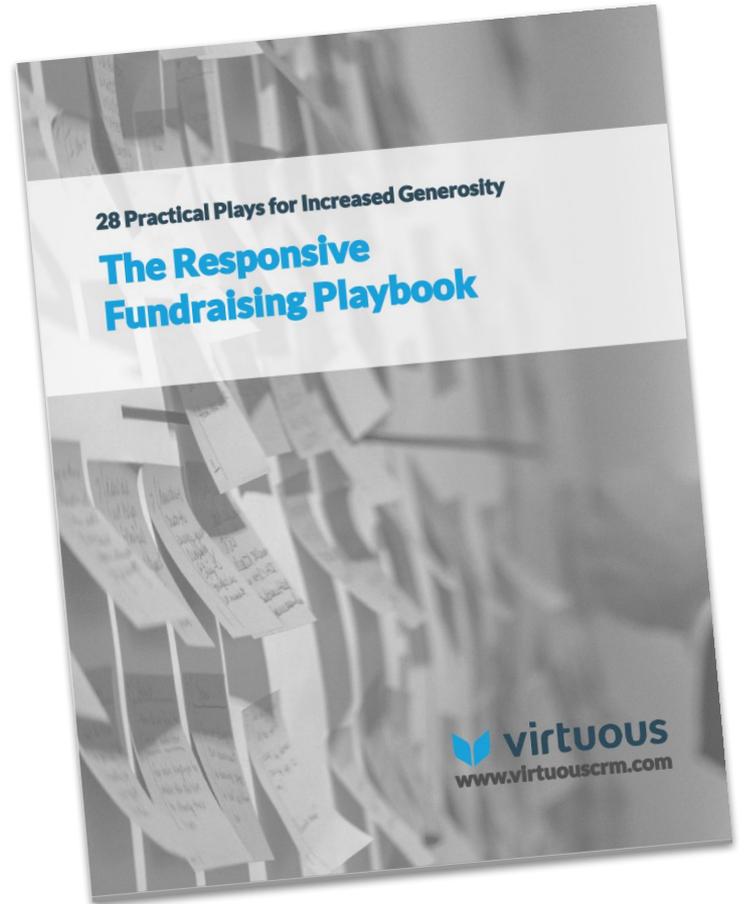
- 1) We're in the midst of a generosity crisis: today's donor desires have shifted. Your fundraising should too.
- 2) Responsive fundraising is a new fundraising model that centers on the donor and treats ALL donors like major donors.
- 3) Responsive fundraising listens for donor signals – involvement, interest, and intent – to personalize each donor's journey.
- 4) Responsive fundraising is dynamic, contextual, and human.



# Offer: The Responsive Fundraising Pack

Send an email to [noahb@virtuouscrm.com](mailto:noahb@virtuouscrm.com) with subject line "OneCause webinar" and I'll send you:

- The 50+ Page Responsive Fundraising Blueprint & Playbook
- A 30-minute video showcasing the why and how of Responsive Fundraising
- All 9 sessions from the first-ever Responsive Nonprofit Summit



A woman wearing a straw hat and a backpack is seen from behind, looking out at a sunset over a body of water. The scene is bathed in warm, golden light. A large white circle is overlaid on the left side of the image, containing the text "Questions?".

**Questions?**



# Raise

## 2020

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Washington, DC  
September 14-15, 2020

THE EVENT FUNDRAISING CONFERENCE

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