

onecause®

# 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

# Transactional to Transformational Giving

## A Roadmap for Success



**Susan Kramer**  
CEO  
Susan Kramer Consulting

 Wednesday, September 25, 2024



# Let's Get Started!

Would you rather be able to **speak every language** or **play every musical instrument**?



# Beyond the Webinar

- ✓ Recording and slides will be sent via email.
- ✓ Look out for exclusive Bonus Content!
- ✓ Visit [OneCause.com/Resources](https://www.onecause.com/resources) for on-demand webinars.
- ✓ Add questions, comment or send emojis in the Chat.
- ✓ Earn 1 CFRE credit with this webinar!
- ✓ Help share on social!



**YOUR FEEDBACK MATTERS: WRAP-UP SURVEY**

**WIN: Amazon Gift Card**  
**Help drive future webinar content!**



# Meet Our Presenter

Susan Kramer works as a Founder & Chief Executive Officer, at Susan Kramer Consulting, which is a nonprofit business services company founded in 2018.

Susan graduated from Denver University's Certification for Jewish Communal Professionals and is currently based in Denver, CO. United States.



**Susan Kramer**

CEO

Susan Kramer Consulting

*transactional*  
to  
TRANSFORMATIONAL  
*giving*<sup>TM</sup>

SUSAN KRAMER CONSULTING

“We make a living by what we get, we make a life by what we give”

– Winston Churchill



# FUNDRAISING IN 7 LETTERS

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A HUMAN-CENTERED PROCESS

Our methodology is based on this simple, yet powerful acronym.

*ide = diva*™

# ICE = DILA™

CREATE LIFELONG DONORS THROUGH  
RELATIONSHIP-BASED FUND DEVELOPMENT



## ENGAGING INDIVIDUALS AND BUILDING RELATIONSHIPS:

- creates passionate donors, investors, leaders, and advocate
- reduces transactional donations
- results in greater relationship-based transformational gifts



# TRANSACTIONAL VS. TRANSFORMATIONAL GIVING™

## TRANSACTIONAL GIFTS

- Registered for an event
- Donated for an honoree
- Rarely at capacity for the donor
- Lack passion or connection
- Result of crowdfunding campaigns
- Are a short game

VS.

## TRANSFORMATIONAL GIFTS

- Come from engagement!
- Are a result of research and understanding of the donor
- Align with the values and passions of the donor
- Are part of a journey; take patience
- Are a long game

**ENGAGEMENT = GIVING**

**Our goal is to create an engagement journey  
to connect passion and action.**

# SODA™

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## SELF -

Know your self. Self awareness is critical. Unpack your money narrative. Understand your temperament.

## ORGANIZATION -

Know your organization.  
Are you a subject matter expert?

## DONOR -

Know your donor. Align the passion of the donor with the action of the non-profit.

## ASK -

Know your ask. Who asks whom, for what, and by when.



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# Know Your Self

# YOUR MONEY NARRATIVE™

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- What did you learn about money while growing up?
- Was your family philanthropic?
- What are your goals/any hesitations with money now?



“Remember that the happiest people are not those getting more, but those giving more.”

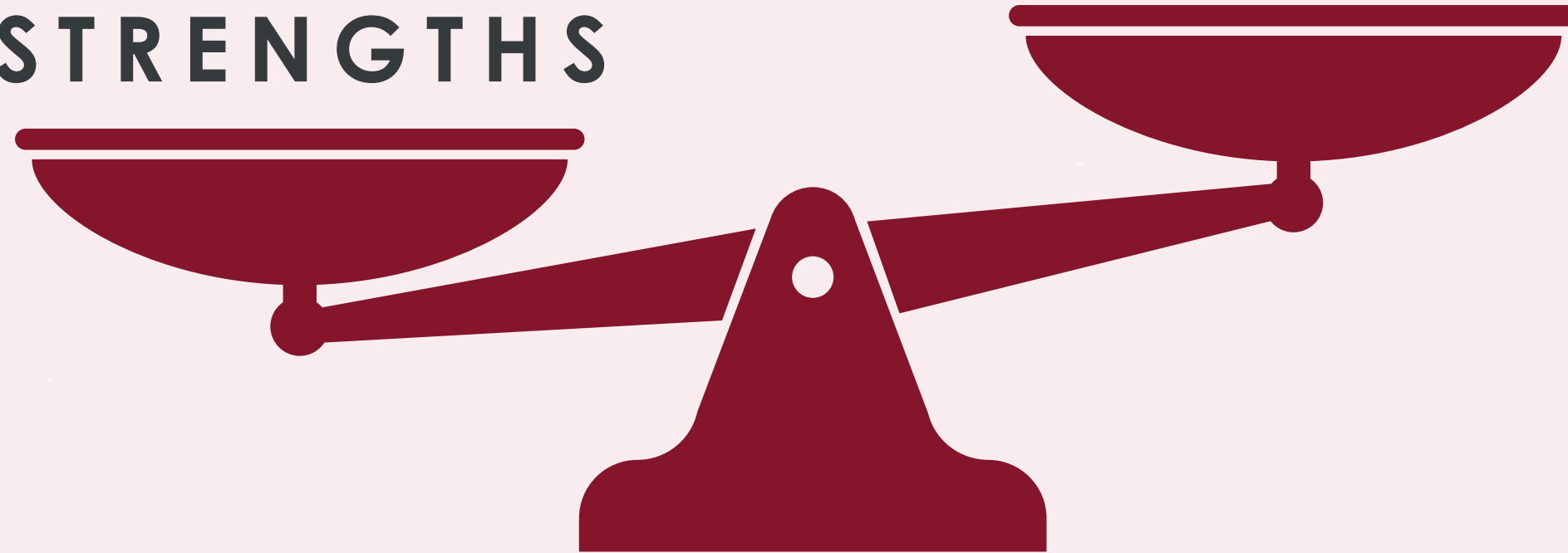
– H. Jackson Brown Jr.

# KNOW WHO IS ON THE TEAM

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LEAN INTO  
**STRENGTHS**

COMPENSATE FOR  
**WEAKNESSES**





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# Know Your Organization

# KNOW YOUR ORG

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- We expect professionals to be subject matter experts.
- Your doctor, dentist, mechanic.
- Are you a subject matter expert in the non-profit world for your organization?

*Are you a  
subject-matter expert?*



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# Know Your Donor



# KNOW YOUR DONOR

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Connect the passion of the donor  
with the actions of the organization.

**Put their passion into action!**

**PASSION + ACTION = RESULTS™**

“The meaning of life is to find your gift. The purpose of life is to give it away.”

– Pablo Picasso

# DISCOVERY INTERVIEW

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## TO DISCOVER YOUR PASSION

- Where did you learn to give?
- Why do you give?
- What inspired you to make your first gift?
- Was giving a priority for your family?
- What's the most meaningful gift you've given?
- Can you tell us a quote about your giving?
- Is there a time you gave more than anticipated?

**IF YOU HAD \$100,000 TO DONATE TO NONPROFITS,  
HOW WOULD YOU ALLOCATE IT?**



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# Know Your Ask

WHO ASKS WHOM FOR WHAT BY WHEN

# RING THEORY™

## FOR CULTIVATING FOUNDATION GIVING

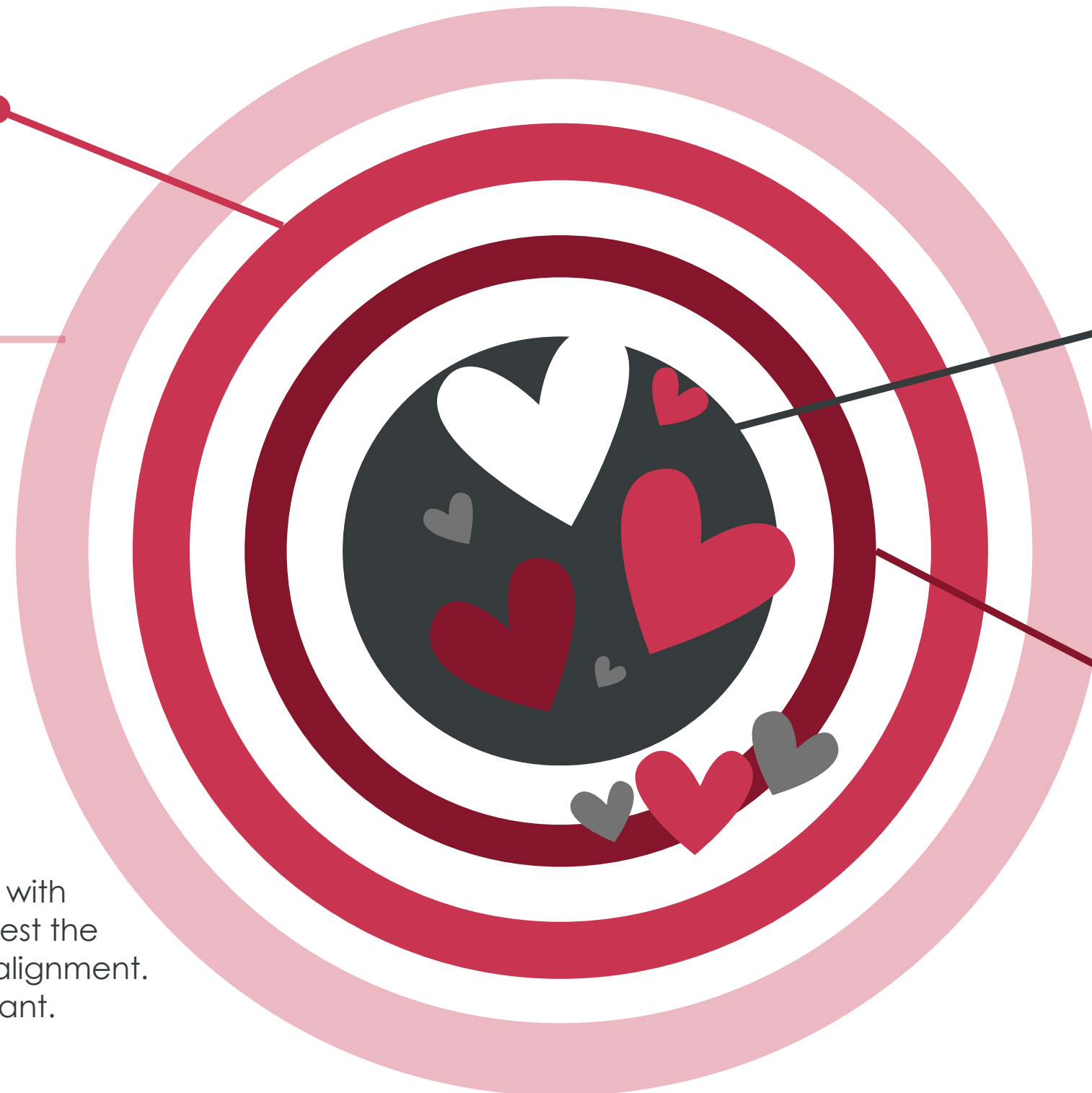
Searches create an assumption there is a connection\*.

FUGETABOUTIT

They know you and love you.

They know people who know you and love you.

\*Need to test the assumption. Connect with a program officer to test the assumption. Confirm alignment. Submit LOI. Submit Grant. Steward foundation



# THE HEART AND SCIENCE OF FUNDRAISING™

YOUR NEXT MAJOR DONOR IS HIDING IN PLAIN SIGHT.

## DATA-DRIVEN

- We use research software and technology to discover the capacity and giving patterns of donors and foundations.
- Our team can help you navigate these tools, and/or we can work on your team and do that research for you.



# LET'S REVIEW

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Fundraising  
is ART and  
Science.

Data driven  
decisions will take  
us to next.

Cold calls are  
FUGGETABOUTIT

Your next  
major donor  
is hiding in  
plain sight.

Concealed  
needs to  
be revealed.

Understand who  
is on the team  
and lean into  
strengths/  
compensate for  
weaknesses.

**...AND HAVE FUN!**

Thank You



*Susan Kramer*

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# Upcoming Webinars

Registration is Now Open!

“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.”

onecause® | WEBINAR

Don't Close the Door on Your Donors:  
**Intentional Inclusivity**  
in Fundraising Events

Wednesday, October 9, 2024

CFRE

**Nikki DeFalco**  
Director, Partner Success  
OneCause

**Diana Fragnito**  
Director, Partner Development  
OneCause

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**Mastering Relationship-Driven Fundraising:**  
A Step-by-Step Guide to Cause Selling & Database Integration

Thursday, November 7, 2024

CFRE

**Jack Alotto MA, CFRE**  
Trainer, Fundraising Academy  
National University

**Jarrett R. Ransom, MBA**  
Trainer, Fundraising Academy  
National University



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★ since 2021 ★

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# Thank you!

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to Raise and Reach More



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Creative Strategies for Enhanced Revenue and Impact  
presented by OneCause for 1.0 points in Category 1.B –  
Education of the CFRE International Application for initial  
certification and/or recertification.

Recording and presentation slides will be emailed to all  
webinar registrants.



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