



# Responsive Fundraising Assessment

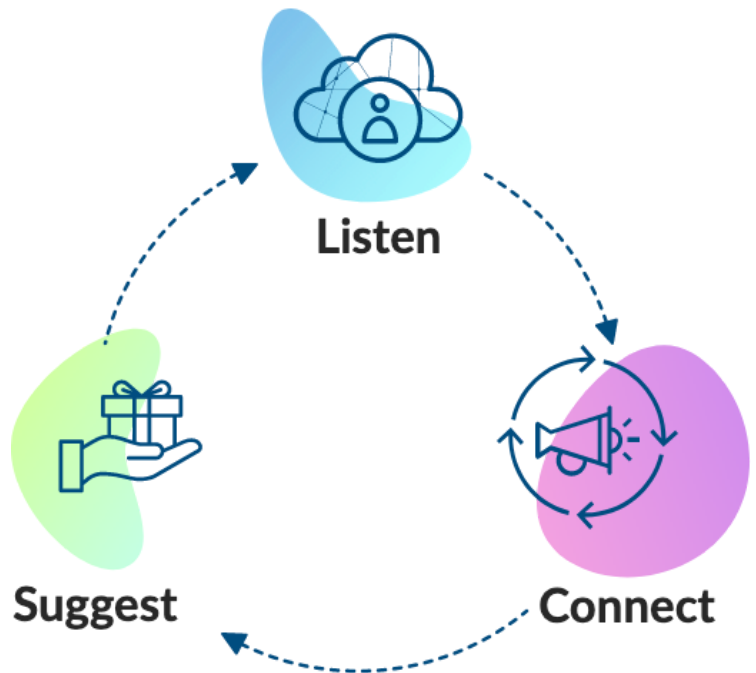
*"Today's nonprofit is handcuffed to outdated fundraising tactics that reserve a personal touch for a select few." — Gabe Cooper, CEO of Virtuous*

## PART I: FUNDRAISING ASSESSMENT

Responsive fundraising puts the donor at the center of fundraising and grows giving through personalized donor journeys that respond to the needs of each individual. The responsive approach builds trust and loyalty through personalized engagement.

Responsive fundraising is your nonprofit's growth strategy. It helps you grow relationships, grow giving, and grow the good you're doing in our world. This assessment is designed to help you and your organization's leaders identify opportunities to improve your strategy and become a responsive nonprofit.

Read through each of the four sections below and add up your scores for each section and identify how you stack up against our recommendations.



## Overall Fundraising Health

The world you're fundraising in has changed. The ways today's donors communicate, connect, and learn have changed dramatically in the last 20 years. This makes it essential, as you assess your organization's ability to be responsive, to review your overall fundraising health, and identify how well your strategy today is acquiring, retaining, and cultivating today's donors.

QUESTIONS	SCORE
Did your organization meet your fundraising goals last year? Yes, by more than 10% (4) Yes (2) No (0) I'm Not Sure (0)	
Over the last 3 years, have your "everyday donors" (less than \$5K per year): Grown (2) Decreased (0) Stayed the Same (1) I'm Not Sure (0)	
Do major donors (over \$5k per year) represent more than 40% of your revenue? Yes (2) No (0) I'm Not Sure (0)	
What is your first time donor retention (% of those who go on to give a 2nd time after their first gift)? I retain: Over 50% (2) Between 30% - 50% (1) Under 30% (0) I'm Not Sure (0)	
What is your overall donor retention (% of donors who gave last year and also gave this year)? I retain: Over 70% (2) Between 50% - 70% (1) Under 50% (0) I'm Not Sure (0)	
What percent of your email list has opened a message in the last 90 days? Less than 20% (0) 20%-40% (1) Over 40% (2) I'm Not Sure (0)	
What is your typical response rate through physical mail? Less than 20% (0) 20%-40% (1) Over 40% (2) I'm Not Sure (0)	
Do you currently use a multi-channel approach for donor cultivation? Yes (2) No (0) I'm Not Sure (0)	
Are you able to track ROI of each campaign from email send or web visit all the way to donation? Yes (1) No (0) I'm Not Sure (0)	
Over the last three years, how has your donor retention rate changed? Increased (2) Decreased (0) I'm Not Sure (0)	
<b>FUNDRAISING HEALTH SCORE</b>	

## Responsive Fundraising: Listen

Responsive fundraising is fueled by donor signals and equips you to deepen relationships as you move each donor through a journey with your cause. This learning can happen directly through conversations or indirectly via social listening, website activity, and email opens and clicks. The more you listen, the more you begin to understand areas of interest, giving opportunities, and how each person wants to connect with the cause.

QUESTIONS	SCORE
Do you have donor personas/Identities defined to help communicate with each type of donor based on their interest in your cause or original intent? Yes (1)      No (0)      I'm Not Sure (0)	
Are you using surveys to better understand the needs and expectations of donors? Yes (1)      No (0)      I'm Not Sure (0)	
Are you using a tracking pixel and email tracking to track the digital engagement of each donor? Yes (1)      No (0)      I'm Not Sure (0)	
Are you asking questions in social media or split testing messages using social ads to better understand what resonates with each donor? Yes (1)      No (0)      I'm Not Sure (0)	
Is your entire team involved in calling donors to say "thank you" and better understand each donor's needs? Yes (1)      No (0)      I'm Not Sure (0)	
Do you use digital engagement, social followership, or other digital signals to identify potential advocates for your organization? Yes (1)      No (0)      I'm Not Sure (0)	
Are first time visitors to your website seeing a donation ask on the home page? Yes (1)      No (0)      I'm Not Sure (0)	
If a user has already signed up for an email list, will they get asked again to subscribe the next time they visit your website? Yes (0)      No (1)      I'm Not Sure (0)	
Do you know what content on your website is driving the most engagement (i.e., are they reading the content? Are they taking action via calls to action within the content?) with users that have not subscribed to an email list or donated? Yes (1)      No (0)      I'm Not Sure (0)	
<b>LISTENING SCORE</b>	

## Responsive Fundraising: Connect

Responsive fundraising ensures you connect with the right donor at the right time with the right message. Responsive fundraising lets you personalize the experience every time you connect with all your donors. When they visit your website, attend an event, receive an email or get a phone call each person should feel like they are part of an ongoing conversation with your organization.

QUESTIONS	SCORE
Is your website content personalized, based on visitors' prior interactions with you? Yes (1)      No (0)      I'm Not Sure (0)	
Do you have a new donor welcome series or donor onboarding plan that is automatically triggered when a donor gives for the first time? Yes (1)      No (0)      I'm Not Sure (0)	
Are you using automation to better respond to donors in real time? Yes (1)      No (0)      I'm Not Sure (0)	
Do you send the name email or mail piece to all donors on a particular date or do you trigger segmented emails and letters based on how a donor is behaving We trigger based on behavior (2)   We send bulk mailings (0)   I'm Not Sure (0)	
Do you have a way to track and respond to lapsed or pre-lapsed donors in real time? Yes (1)      No (0)      I'm Not Sure (0)	
Do you send different content to donors based on their persona, interest or stage in their donor journey? Yes (1)      No (0)      I'm Not Sure (0)	
Are you telling a coordinating story across all of your channels (email, mail, web, broadcast, etc) all have complementary stories, results and CTAs? Yes (1)      No (0)      I'm Not Sure (0)	
Are you able to close the loop with each mid and low-tier donor and provide details of specific impact for their donations (stats and stories)? Yes (1)      No (0)      I'm Not Sure (0)	
Once a website visitor has subscribed to your email, does your website content change to offer resources related to the specific email list they joined? Yes (1)      No (0)      I'm Not Sure (0)	
Have you established ways to connect directly to your top 25% most engaged website visitors? Yes (1)      No (0)      I'm Not Sure (0)	
<b>CONNECTING SCORE</b>	

## Responsive Fundraising: Suggest

Suggestions don't always have to include a financial ask. The best suggestions may include learning experiences for the donor, opportunities for donors to volunteer, or invitations to use their influence to share the cause with friends. Your suggestions are a response to what you know, what's the next right thing, and is dynamic as you listen and connect further with each donor.

QUESTIONS	SCORE
<p>How many non-financial calls to action do your donors receive per year? (i.e. share, volunteer, learn, etc)?</p> <p>Less than 3 (0)            3 to 5 (1)            More than 5 (2)    I'm Not Sure (0)</p>	
<p>In every communication, can you articulate the value that you provide to the donor and not just the value to your organization?</p> <p>Yes (2)            No (0)            Sometimes (1)            I'm Not Sure (0)</p>	
<p>Do you regularly use institutional urgency ("give this month or we can't do our work!") or "problem casting" ("people are going to die if you don't give") in your fundraising rather than talking about impact ("our organization is helping millions") and vision ("we will help tens of millions by 2030")?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Do you tailor the ask amount on your website donation form and/or mailed asks, based on your donors' known giving patterns and capacity?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Is your donation ask related to topics your visitors have already shown they find interesting?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Does it take more than 1 click to reach the donation form from the "Donate" button on your homepage?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Does your donation page have buttons, banners, or navigation that takes the donor out of the donation process?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Do you have to "pinch and zoom" on a mobile device to complete your donation page?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	
<p>Do you require donors to register or login to an account to make a donation?</p> <p>Yes (1)            No (0)            I'm Not Sure (0)</p>	

Does your donation process require donors to add their donation to a "cart"? Yes (1)      No (0)      I'm Not Sure (0)	
Does your donation page allow donors to opt-in to your email list? Yes (1)      No (0)      I'm Not Sure (0)	
Does it take longer than 5 seconds for your donation page to load? Yes (1)      No (0)      I'm Not Sure (0)	
Do you know what your average donation conversion rate is from your website? Yes (1)      No (0)      I'm Not Sure (0)	
Have you made any changes to your donation page in the last 3 months? Yes (1)      No (0)      I'm Not Sure (0)	
Have you performed an A/B split test on your donation process in the last 6 months? Yes (1)      No (0)      I'm Not Sure (0)	
If you offer a gift as a donation incentive is it the same gift for everyone or does the gift change based on the website visitor's interests? It Changes (1)      It's The Same (0)      I'm Not Sure (0)	
Are you able to trigger a donation ask in real-time based on the website visitor's current actions? Yes (1)      No (0)      I'm Not Sure (0)	
If a website visitor has donated before are you using their payment preferences in your donation ask? (i.e. credit card, ACH, PayPal, mailed in check). Yes (1)      No (0)      I'm Not Sure (0)	
<b>SUGGESTING SCORE</b>	

## PART II: RESPONSIVE RECOMMENDATIONS

Review your scores for each focus area above and compare those against the recommended scores below. This will help identify areas of strength and opportunity for your organization to explore as you adopt a responsive fundraising strategy.

FOCUS AREA	YOUR SCORE	TARGETS	RECOMMENDATIONS
Fundraising Health		Over 18 = On Track	Xxxx
		Between 12-18 = Average	<i>*See pages 25-35 in the pocket guide</i>
		Below 12 = Needs Work	
Listening for Donor Signals		Over 18 = On Track	Xxxx
		Between 12-18 = Average	<i>*See pages 39-58 in the pocket guide</i>
		Below 12 = Needs Work	
Connecting Personally		Over 18 = On Track	Xxxx
		Between 12-18 = Average	<i>*See pages 59-80 in the pocket guide</i>
		Below 12 = Needs Work	
Contextualizing Suggestions		Over 18 = On Track	Xxxxx
		Between 12-18 = Average	<i>*See pages 81-98 in the pocket guide</i>
		Below 12 = Needs Work	

### Next Steps: Becoming A Responsive Nonprofit

When you become responsive instead of reactive, you'll connect with donors in a more meaningful way, adapt to the changes in the hyperconnected world, and grow your fundraising. For additional resources and the latest on responsive fundraising visit [virtuouscrm.com/responsive](http://virtuouscrm.com/responsive).