Raise® 2021

What is your donor's giving language?
Engaging your donors with multi-channel fundraising

Stephanie Adomaitis

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Agenda

1. Welcome / About Us
2. Interactive Poll
3. Identify, Plan, and Analyze
4. Case Studies
5. Results
6. Questions and Panel Discussion

Welcome

Kirsten Turpel

- Donor Engagement Giving Programs Specialist
- The Rotary Foundation

Stephanie Adomaitis

- Donor Engagement Manager, CFRE
- The Rotary Foundation

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About Us

What is Rotary?

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change across the globe. Our clubs work together to:

- Promote peace
- Fight disease
- Provide clean water, sanitation, and hygiene
- Save mothers and children
- Support education
- Grow local economies
- Protect the environment

Our Foundation at Work

<u>The Rotary Foundation funds projects through grants to make this possible!</u> During our 2020-21 Rotary Year, our generous donors have made it possible for us to fund over 2,000 global grants and 400 local district grants.

We have donors in over 180 countries, with more than 10 languages supported and 17 currencies.

GET YOUR PHONES READY!

Interactive Activity

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What is your giving language?

LET'S TAKE A POLL!
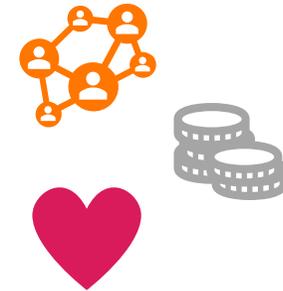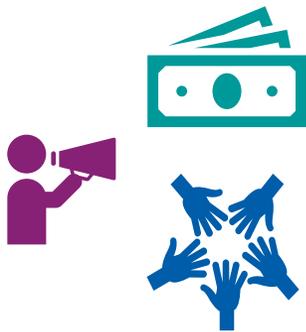
Open your smartphone browser and go to
live.voxvote.com
enter the following numbers
PIN: 70759
Voting is **anonymous**.
Screen name or **(nick)name** is optional.

Alternative: Download the VoxVote app from

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What is your giving language?

The Traditionalist
Gives at least once annually by check or online

Fearless Fundraiser
Fundraises for your organization through social media, peer-to-peer platforms, or crowdfunding

The Amplifier
Wants to make a big impact by leveraging corporate match opportunities or is a recurring donor

Cause Crusader
Interested in funding specific causes, projects, or volunteering their service

Casual Supporter
Often a lapsed donor who makes occasional, smaller gifts

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YOUR DONOR'S GIVING LANGUAGE

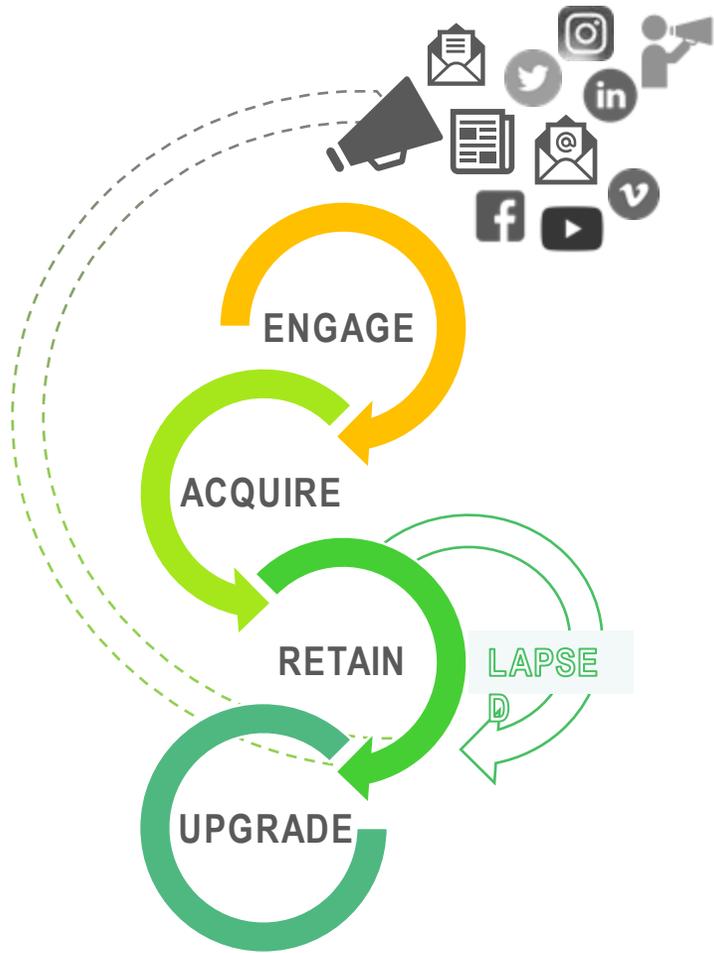## HOW TO SEGMENT YOUR SUPPORTERS TO BUILD A FUNDRAISING STRATEGY

Build Your Strategy
PLANNING FOR SUCCESS

1. Identify your Segments
2. Review Current Communications
3. Plan Your Year
4. Test New Opportunities
5. Perform Analytics and Capture Results

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Identify Your Segments

Giving History
- Amount
- Frequency
- Philanthropic Interest
- Payment Method

Recent
Lapsed
   LYBNT (Last Year But Not This)
   SYBNT (Some Years But Not This)
Non-Giving

Membership Status
- Volunteer Leadership
- Active Rotarian
- Past Rotarian
- Rotaractor, Program Alumni

Established
New Member
Terminated

Donation Method
- Online, Electronic
- Mail, In-hand

Location
- State, Country
- Zone, District

Language
- DE, EN, ES, FR, IT, JA, KO, PT, SV, ZH

ENGAGE
ACQUIRE
RETAIN
LAPSED
UPGRADE

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Review Current Communications

List the details of your current annual philanthropic communications, then ask:

- Are there any opportunities to target new donor segments?
- Any slow times during your year to try a new ask?
- Can you expand existing campaigns to additional communication outlets?

Communication Production Overview

| Focus	Staff	Project Name	Start Month	Send Date	Drop Year	Purpose	Mode	Type	Target Audience	Languages	Region
PolioPlus	SA	World Polio Day	7	24 Oct	2020	Solicitation	Multi	DM, Email	Current, Lapsed Polio		
Annual Fund	SA	Give the Gift of Rotary	8	23 Nov	2020	Solicitation	Multi	DM, Email	Lapsed, Current, PHS	EN,	US
Annual Fund	SA	Giving Tuesday	8	1 Dec	2020	Solicitation	Email	Adestra	Prospective, Current < $500 Donors	DE, EN, ES, FR, IT, JA, KO, PT, ZH	27 Countries
Giving Program	KT	Rotary Direct	1	18 Feb	2021	Solicitation	Email	Adestra	Online Donors, not enrolled	EN, ES, PT	Brazil, Central America, US, Australia
Giving Program	KT	Paul Harris' Birthday	12	19 Apr	2021	Solicitation + Stewardship	Email	Adestra	PHS Members	DE, EN, ES, FR, IT, JA, KO, PT, ZH	Worldwide

Plan Your Year

August 2020

ALL DONOR THANK YOU

September 2020

RAISE FOR ROTARY
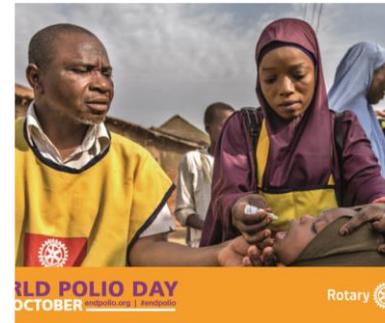
October 2020

WORLD POLIO DAY

December 2020

GIVE THE GIFT

December 2020

GIVING TUESDAY

April 2021

PAUL HARRIS' BIRTHDAY

May 2021

ROTARY DIRECT

June 2021

ROTARY YEAR END

Test New Opportunities

Rotary is the original peer-to-peer fundraising model, relying on club members to raise money together to support projects they are passionate about.
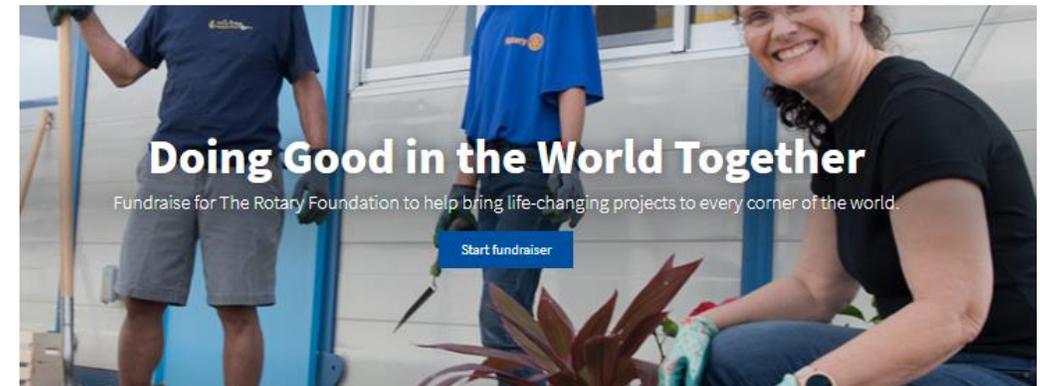
New Opportunity
How can we attract new, younger members to engage with The Rotary Foundation?

Build an actual peer-to-peer fundraising tool!

SINCE WE LAUNCHED IN AUGUST 2020:
- **850+ Fundraisers created**
- **5,000+ Donors contributed**
- **$450,000+ Funds raised**

Doing Good in the World Together
Fundraise for The Rotary Foundation to help bring life-changing projects to every corner of the world.
Start fundraiser

I AM RAISING FOR PEACE-BUILDING & CONFLICT PREVENTION

Raise for Rotary

FUNDRAISE FOR THE ROTARY FOUNDATION

You can use this tool to fundraise for your favorite Foundation cause and share how you are Doing Good in the World with your social networks!

Start your fundraiser at **rotary.org/raise**.

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Analytics and Results

Be sure to capture your:

- Costs and Cost Per Dollar Raised (CPDR)
- Funds Raised
- Final List Size
- Response Rate
- Engagement Metrics (Open Rate, Click Rate)

Case Studies

Using Data to Measure Success

Let's look at some examples that use these strategies and multi-channel communication methods!

1. Give the Gift of Rotary
2. Giving Tuesday
3. Rotary Direct
4. Paul Harris' Birthday
5. World Polio Day

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Case Study #1

GIVE THE GIFT OF ROTARY APPEAL

Target Segment: The Traditionalist
Channels: Direct Mail, Email Series, Social Media, Magazine Ad, Flyer
Primary Call to Action: Donate
Content: Demonstrate the impact your gift can do
Target Regions: Global
Frequency: Annual

FUNDRAISING RESULTS

$10,000,000	
$8,000,000	
$6,000,000	
$4,000,000	
$2,000,000	
$0	

FY15 FY16 FY17 FY18 FY19 FY20 FY21
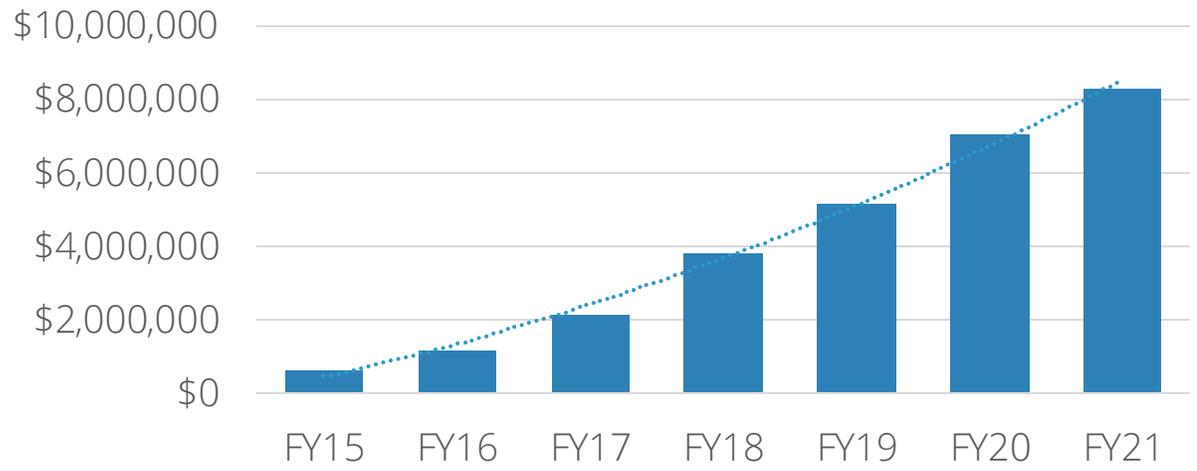
Case Study #2

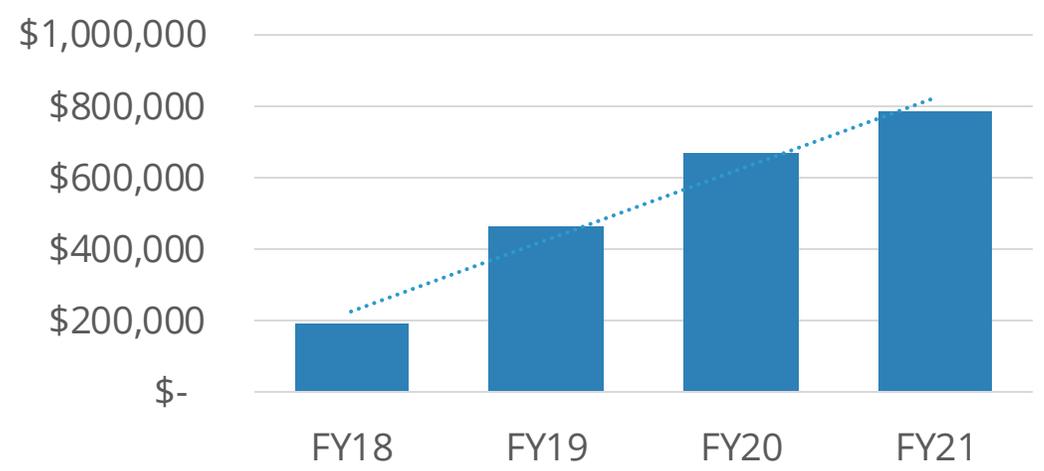## GIVING TUESDAY APPEAL

Target Segment: Fearless Fundraiser, Casual Supporter
Channels: Direct Mail, Email Series, Social Media, Magazine Ad, Flyer, Chronicle of Philanthropy, Video
Primary Call to Action: Donate
Content: Demonstrate the impact your gift can do
Target Regions: Select Countries
Frequency: Annual

FUNDRAISING RESULTS

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Case Study #3

ROTARY DIRECT APPEAL

Target Segment: Amplifier
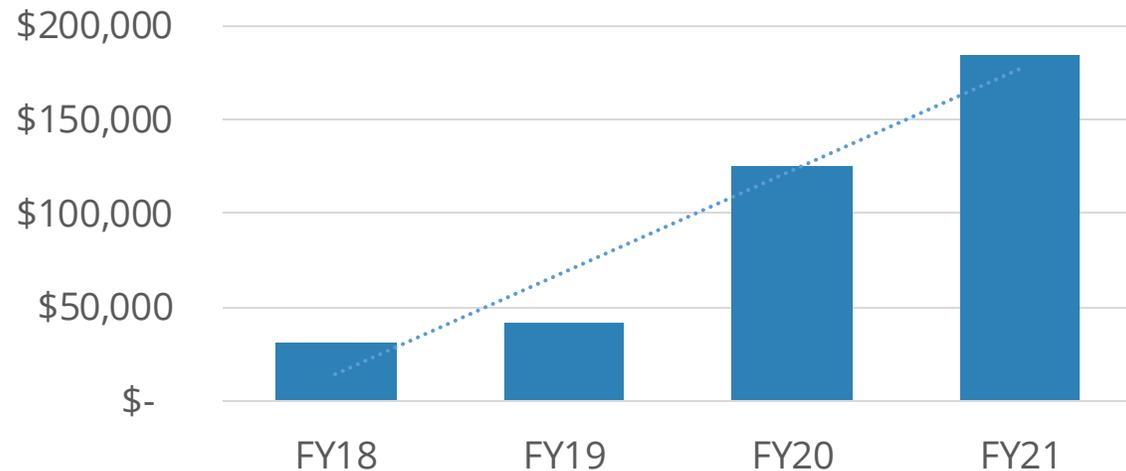**Channels**: Email Series
Primary Call to Action: Sign up for recurring giving
Content: Demonstrate the impact your recurring gifts can do
Target Regions: Select countries
Frequency: Quarterly

FUNDRAISING RESULTS

Bar chart showing fundraising results rising from FY18 (~$30,000), FY19 (~$40,000), FY20 (~$125,000), to FY21 (~$185,000). Y-axis ranges from $- to $200,000.

Easy. Fast. Secure.
Rotary Direct.

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Choose what you would like to support

Featured Causes   Areas of Focus

Contributions to these featured causes are eligible for Paul Harris Fellow recognition.

Annual Fund	Polio Fund
Learn more	Learn more
World Fund	Disaster Response Fund
Learn more	Learn more

Case Study #4

PAUL HARRIS BIRTHDAY

Target Segment: Traditionalist
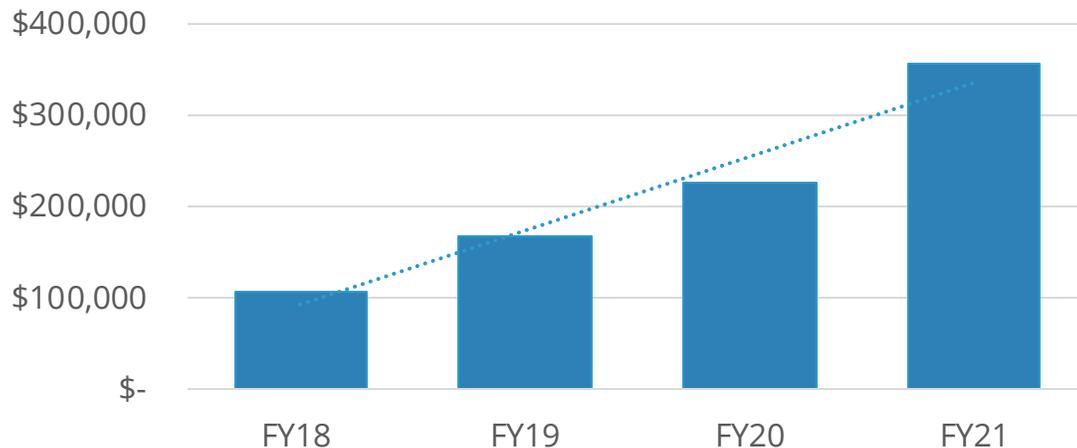**Channels**: Email Series, Social Media, Magazine Ad, Web feature
Primary Call to Action: Donate, Thank Supporters
Content: Demonstrate the impact your gift can do
Target Regions: Global
Frequency: Annual

FUNDRAISING RESULTS

$400,000	
$300,000	
$200,000	
$100,000	
$-	
	FY18 FY19 FY20 FY21

CELEBRATING PAUL HARRIS

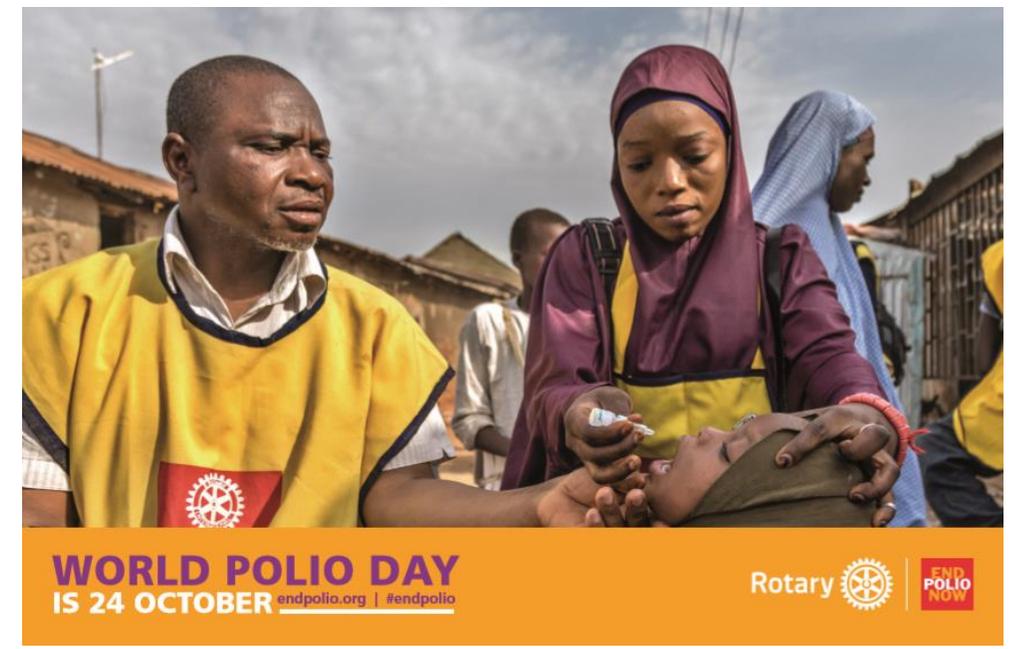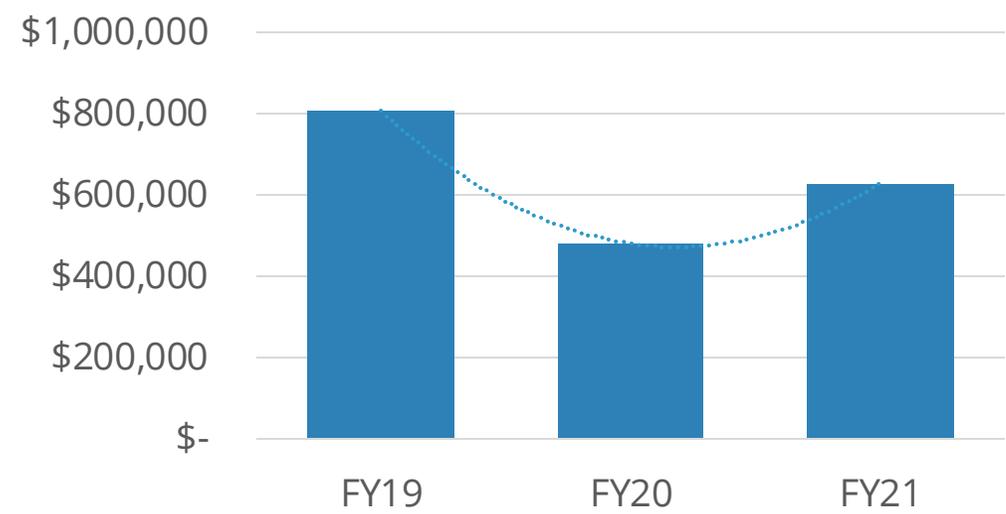The Rotary Foundation

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Case Study #5

WORLD POLIO DAY APPEAL

Target Segment: Traditionalist, Fearless Fundraiser, Cause Crusaders
Channels: Direct Mail, Email Series
Primary Call to Action: Give to PolioPlus
Content: Help us end polio forever
Target Regions: Global
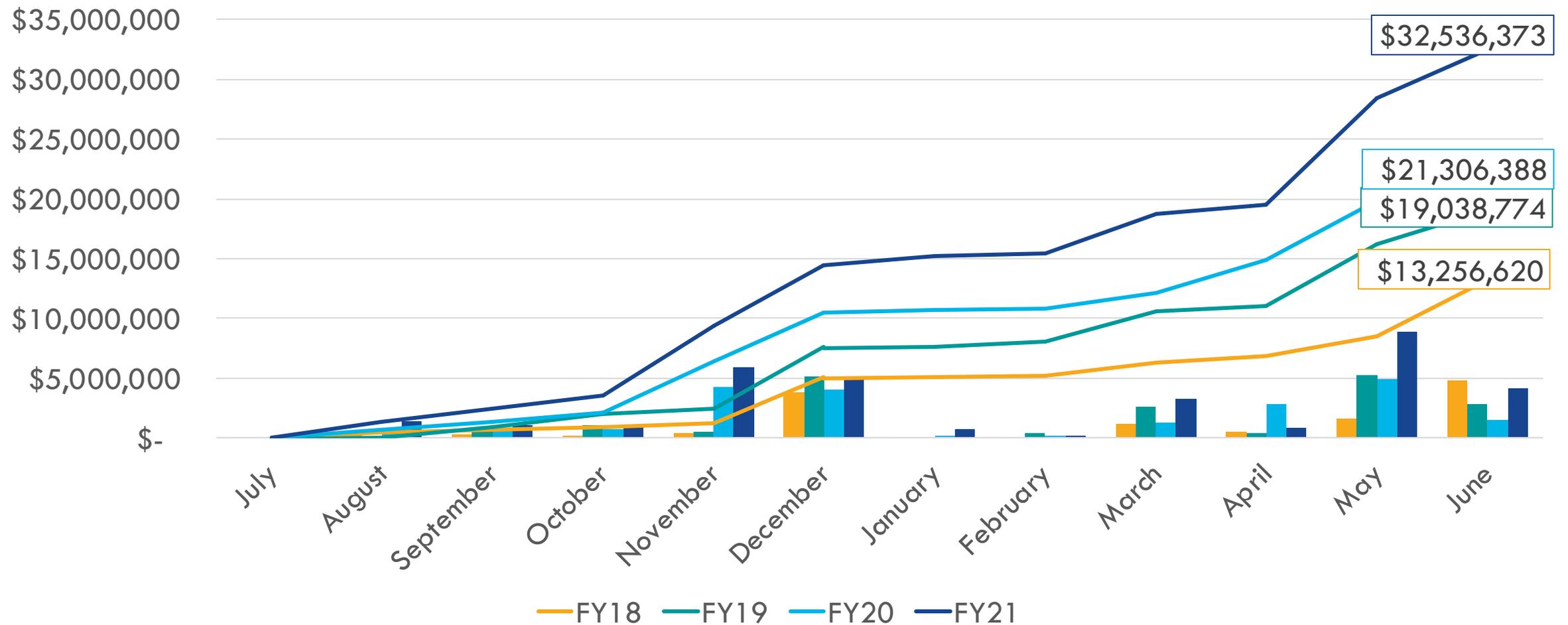**Frequency**: Annual

FUNDRAISING RESULTS

$1,000,000	
$800,000	
$600,000	
$400,000	
$200,000	
$-	
	FY19 FY20 FY21

WORLD POLIO DAY IS 24 OCTOBER endpolio.org | #endpolio

Rotary — END POLIO NOW

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RESULTS

DID IT WORK?