



Raise[®]
2023

The Responsive Mindset

How to Increase Donor Retention in a Changing Economic World

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Our World Today



Economic

Global economy is showing signs of recovery

Federal Reserve officials announce pause in US interest-rate hikes

Stocks climb on inflation data, moving further into a bull market



Social

Top agenda items for WEF Davos Meeting 2023 were reversing inequality, safeguarding economic futures, and upholding civil freedoms

UNESCO report reveals \$97B global gap to reach the Sustainable Development Goal's education targets



Political

World leaders will come together in September to discuss the Sustainable Development Goal midpoint

The US has begun ramping up to its 2024 presidential election

Global tensions rise between the US and China over Taiwan, and ongoing crises in Ukraine



Technological

Generative AI and machine learning are becoming more disruptive and accessible

Shakeups amongst top tech leadership are playing out in the stock market and economy

US, Europe, and China racing to drive quantum computing innovation



Environmental

Jan. 2023's climate report showed 7th highest global average temperature since 1850

US cities see unprecedented impact from climate crisis

WEF, WTO, and WBG launch Action on Climate and Trade

2022 in Philanthropy

FRESH FACES



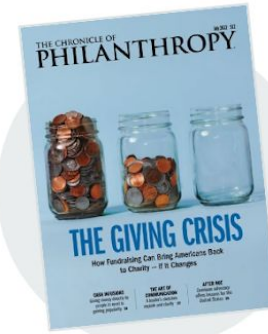
FEBRUARY

POWER SHIFT



MAY

THE GIVING CRISIS



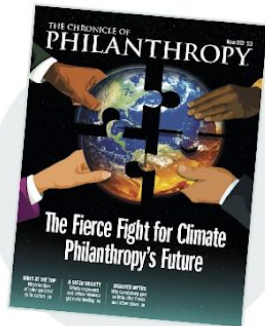
JULY

FUNDRAISERS WANTED



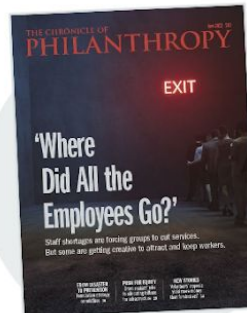
NOVEMBER

MARCH



THE FIERCE FIGHT FOR CLIMATE PHILANTHROPY'S FUTURE

JUNE



"WHERE DID ALL THE EMPLOYEES GO?"

SEPTEMBER



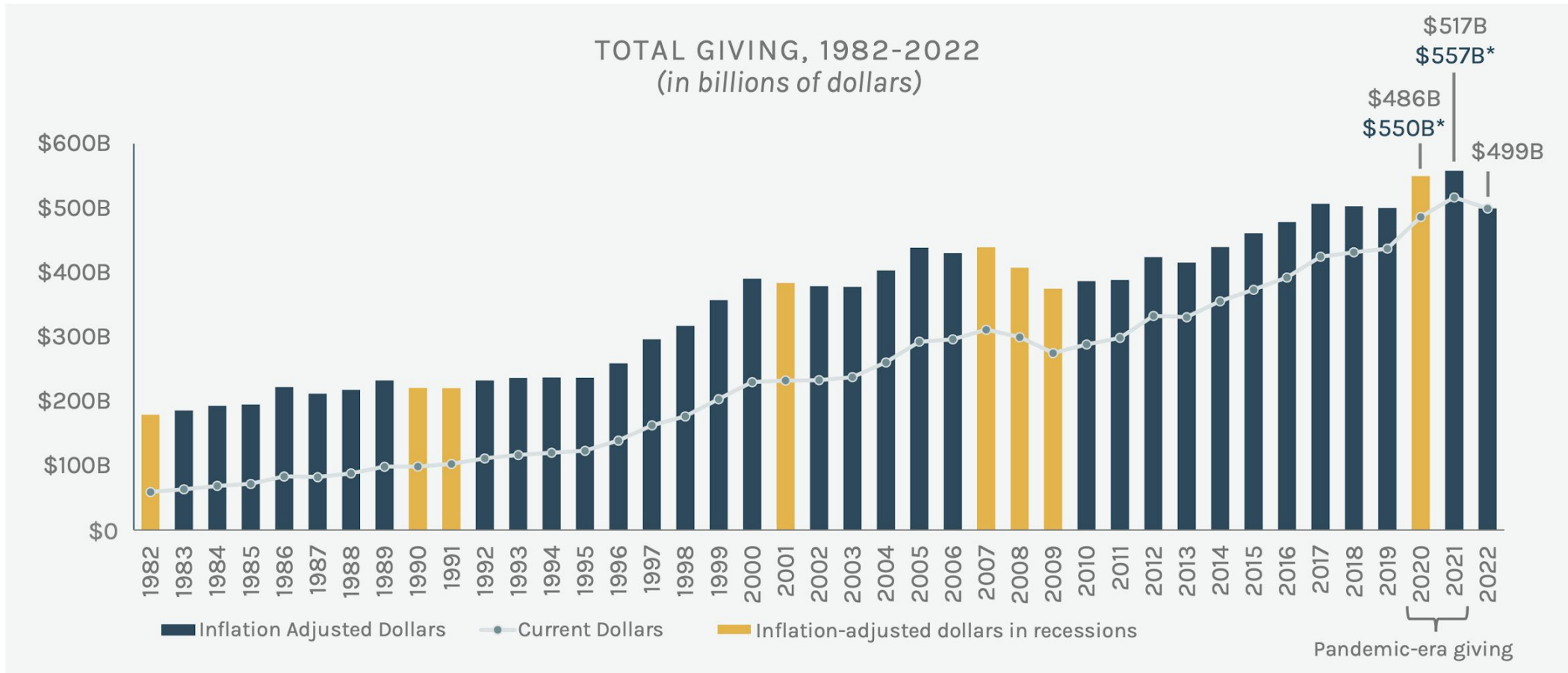
VOLUNTEERS: WHY AND HOW CHARITIES SHOULD REVIVE A DECLINING BUT VITAL SOURCE

DECEMBER



THE FUTURE IS NOW

Giving declined to \$499.33 billion in 2022, a year influenced by the stock market and economic uncertainty



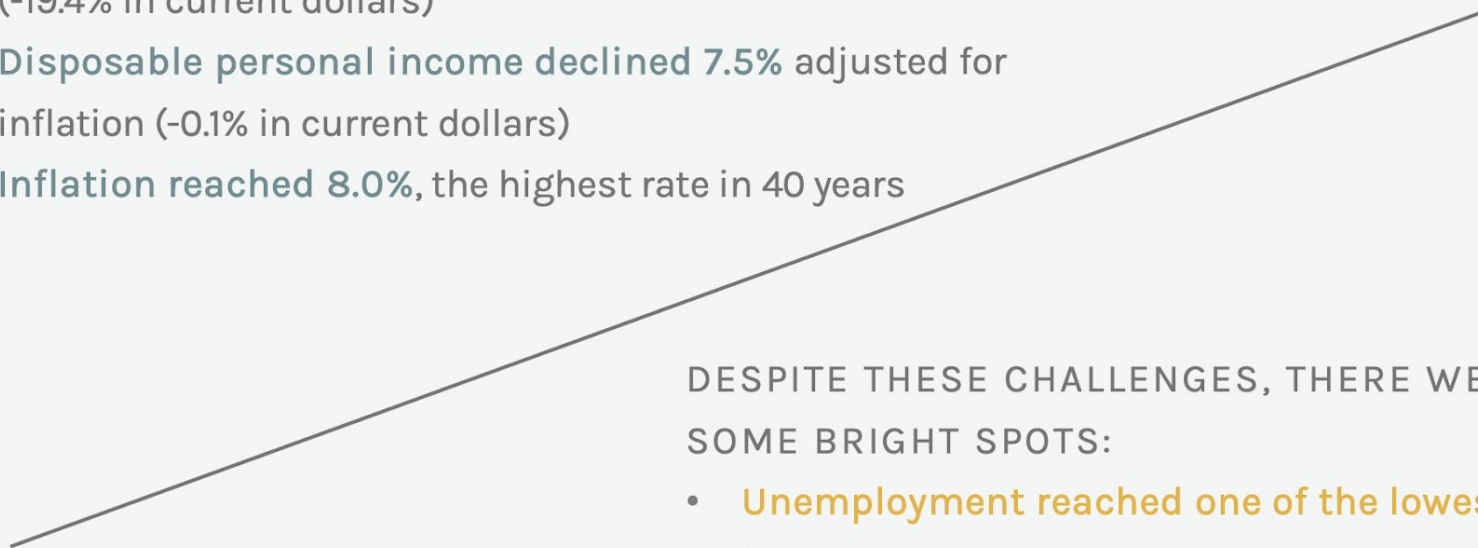
*Inflation adjusted dollars

New economic challenges emerged in 2022 that had a dampening effect on giving



CHALLENGES INCLUDED:

- S&P 500 declined 25.4% adjusted for inflation (-19.4% in current dollars)
- Disposable personal income declined 7.5% adjusted for inflation (-0.1% in current dollars)
- Inflation reached 8.0%, the highest rate in 40 years

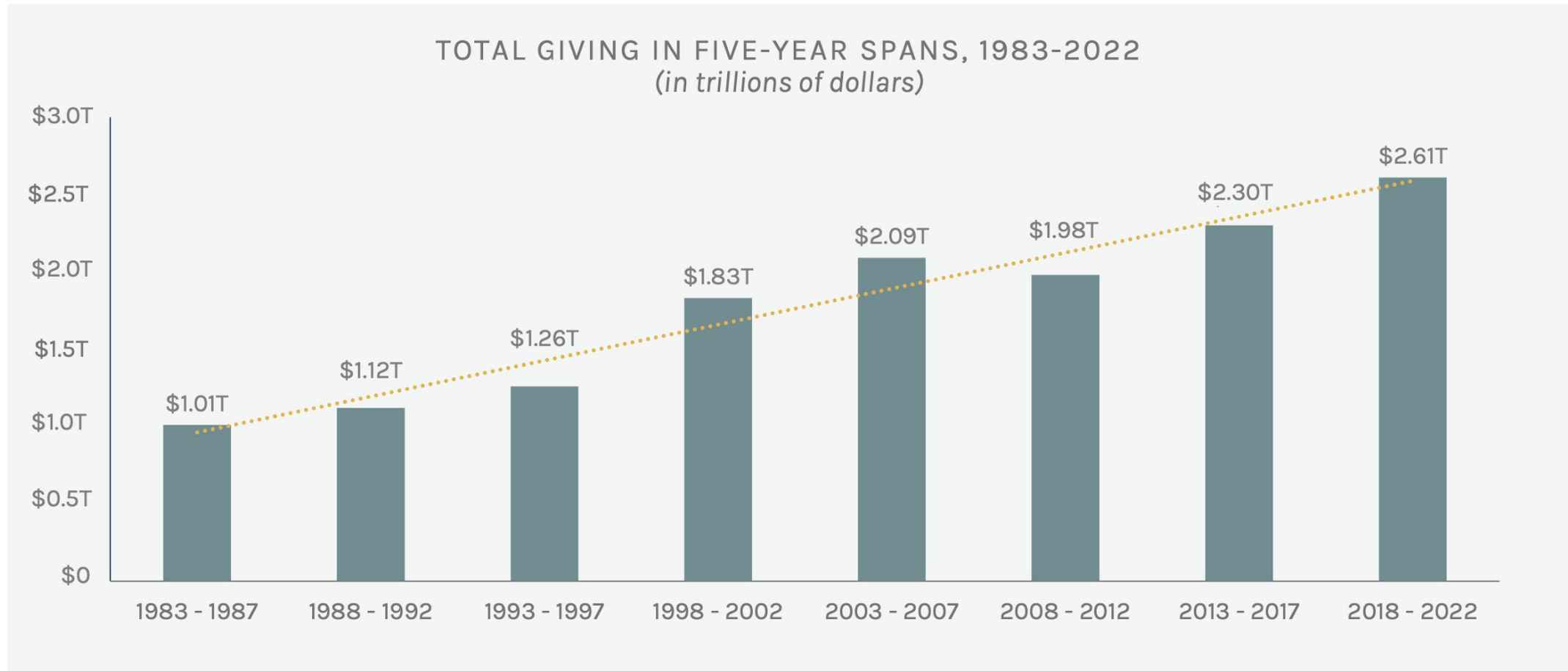


DESPITE THESE CHALLENGES, THERE WERE SOME BRIGHT SPOTS:

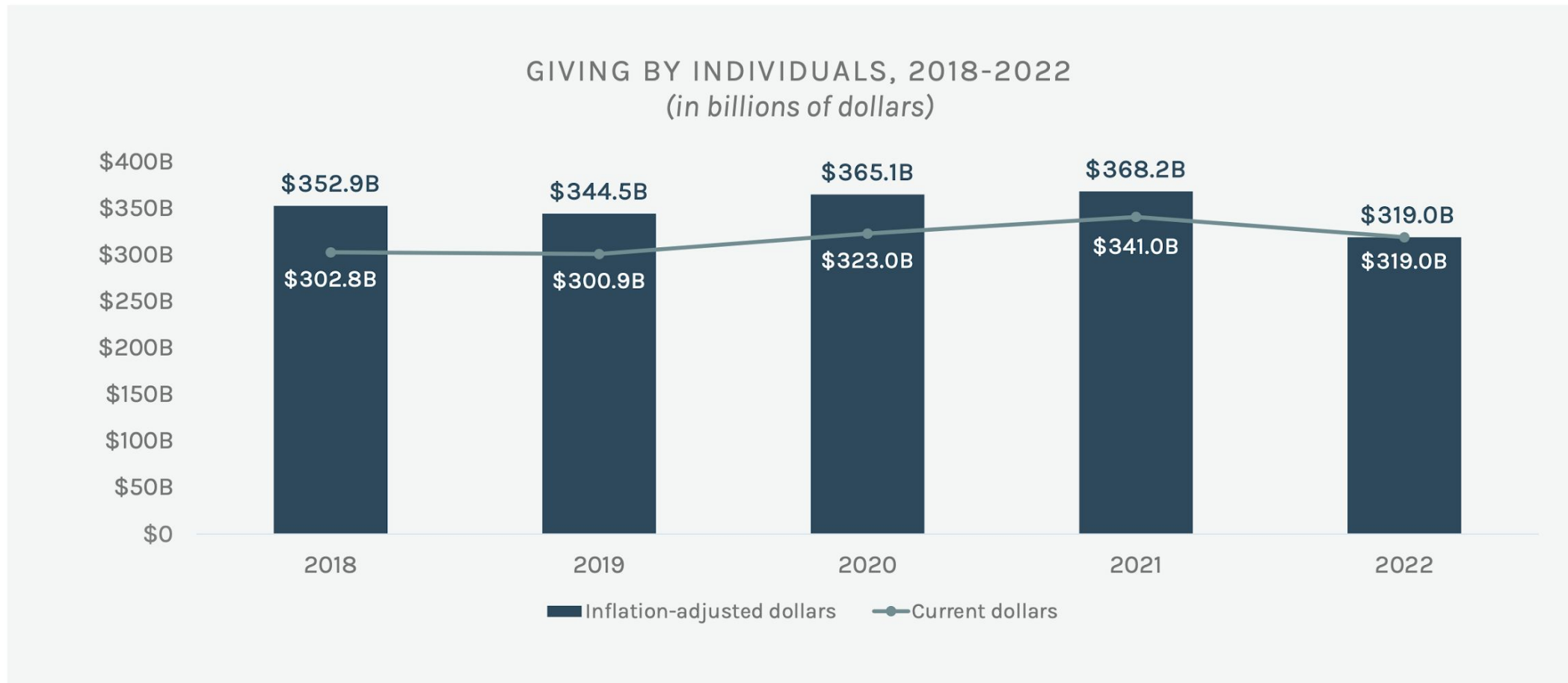
- **Unemployment reached one of the lowest rates** in the last 50 years
- **GDP grew 1.1%** adjusted for inflation (9.2% in current dollars)



Although giving fluctuated in 2022, it remains resilient over the years

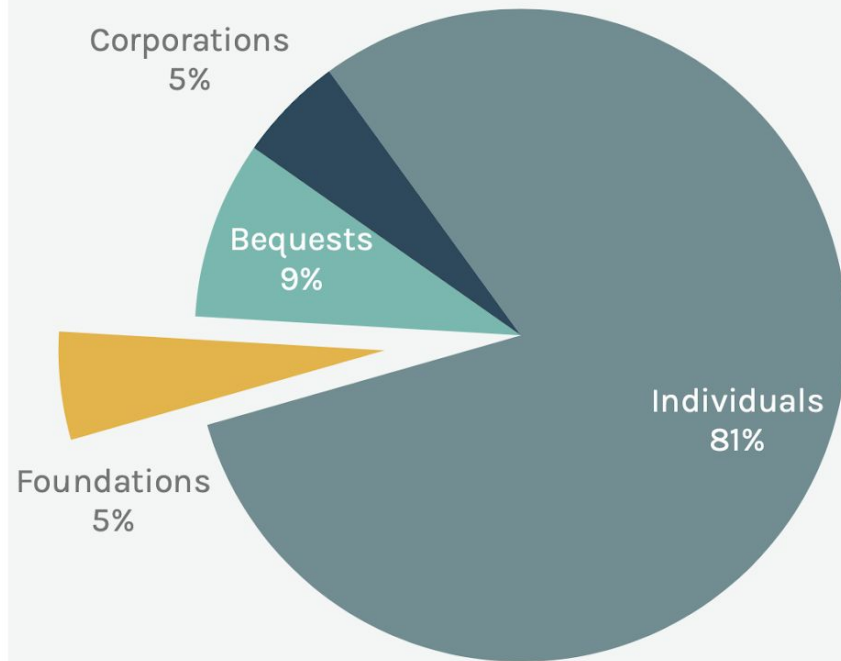


Giving by individuals experienced decline after two of the most generous giving years on record

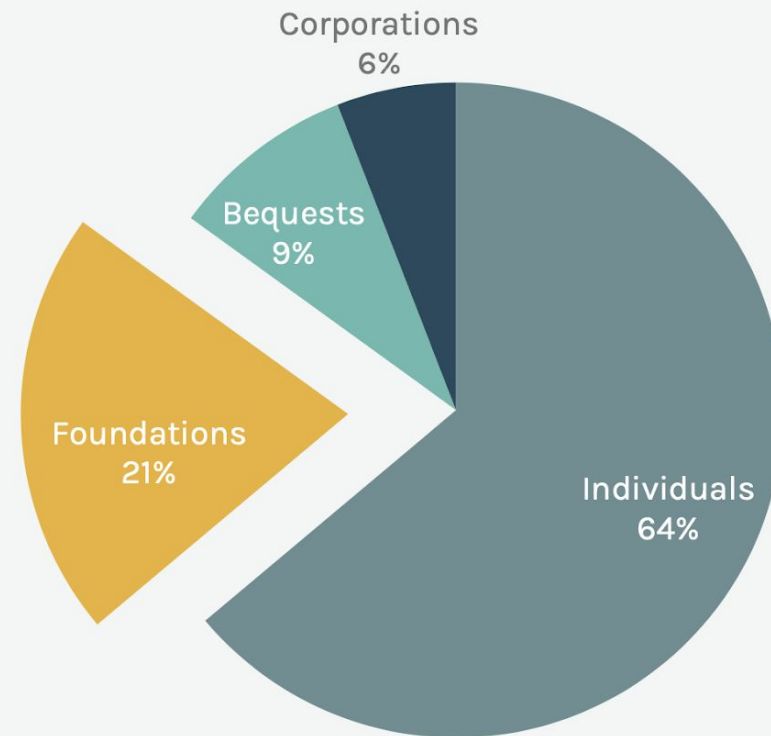


Giving by foundations is growing as a share of total giving

1982 CONTRIBUTIONS BY SOURCE



2022 CONTRIBUTIONS BY SOURCE



generosity
generosity
generosity

The word "generosity" is written in a white, cursive script font. It is layered multiple times, creating a sense of depth and movement. The layers are color-coded with a rainbow gradient, starting with red and orange at the top, transitioning through yellow, green, and blue, and ending with purple at the bottom. The background is a dark, deep blue with subtle, curved light patterns. In the bottom-left corner, there are two overlapping, curved lines in a bright cyan color.





“We have to devise means of making known the facts in such a way as to touch the imagination of the world. The world is not ungenerous, but unimaginative and very busy.”

We're facing a **major challenge...**

Why nonprofits are changing...

Traditional Approach

Lagging Donor Retention

Drifting from Today's Donor

Legacy Tactics = Same Results

Responsive Fundraising

- ↑ 10% increase in average gift
- ↑ 12% increase in retention
- ↓ 20% decrease in staff time
- ✓ 10x ROI

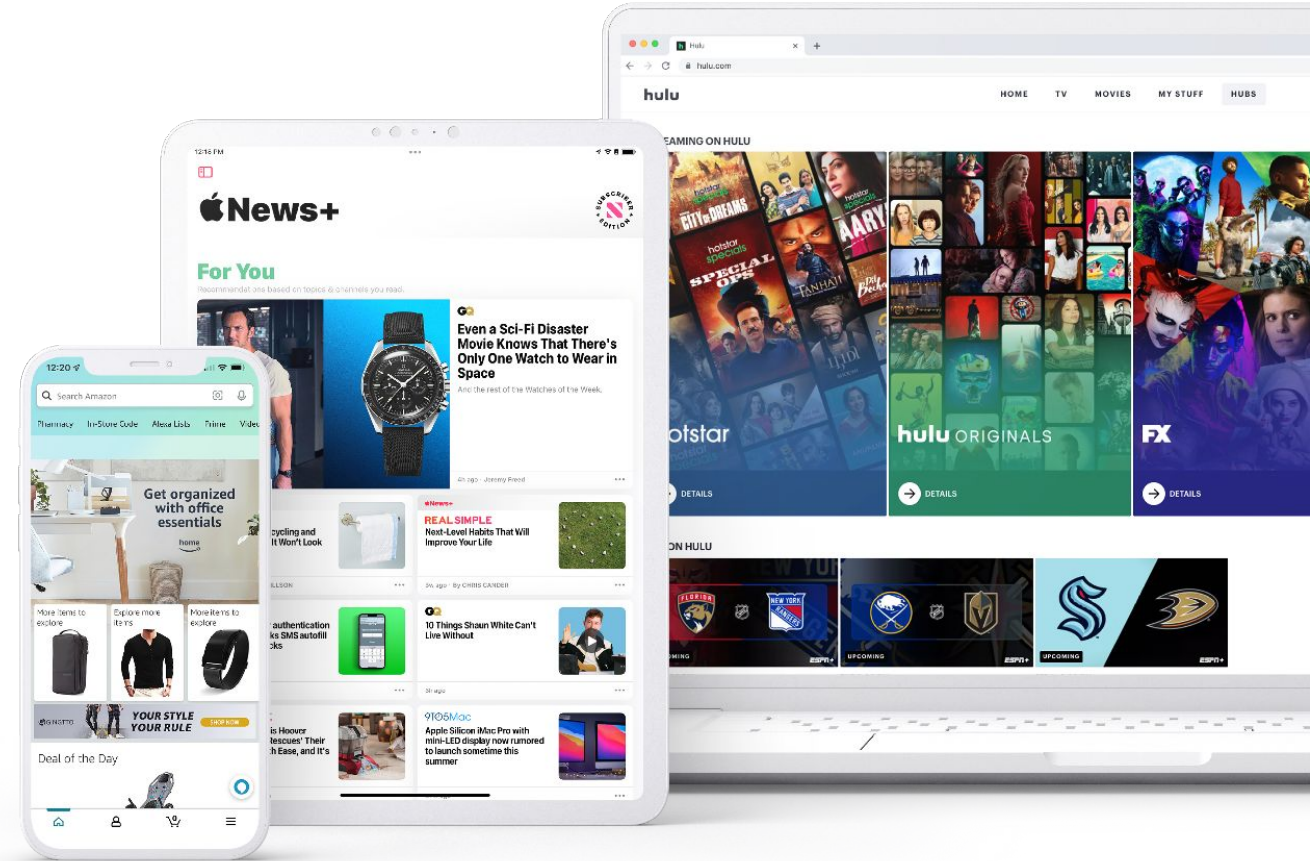
*Based on aggregated results from other Virtuous customers

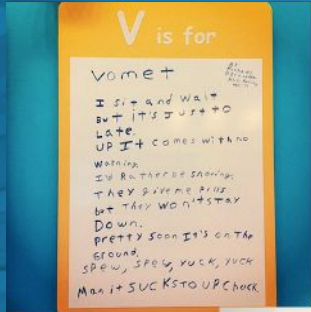
The world you fundraise in **has changed.**

What changed?

Shift from mass communications to personal, responsive experiences.

- ✓ **Personalized experiences**
Moving away from one-size-fits-all
- ✓ **Two-way, behavior driven**
Triggered in response to data signals





Giving is personal.

Today's donors expect a personal connection to causes they care about.

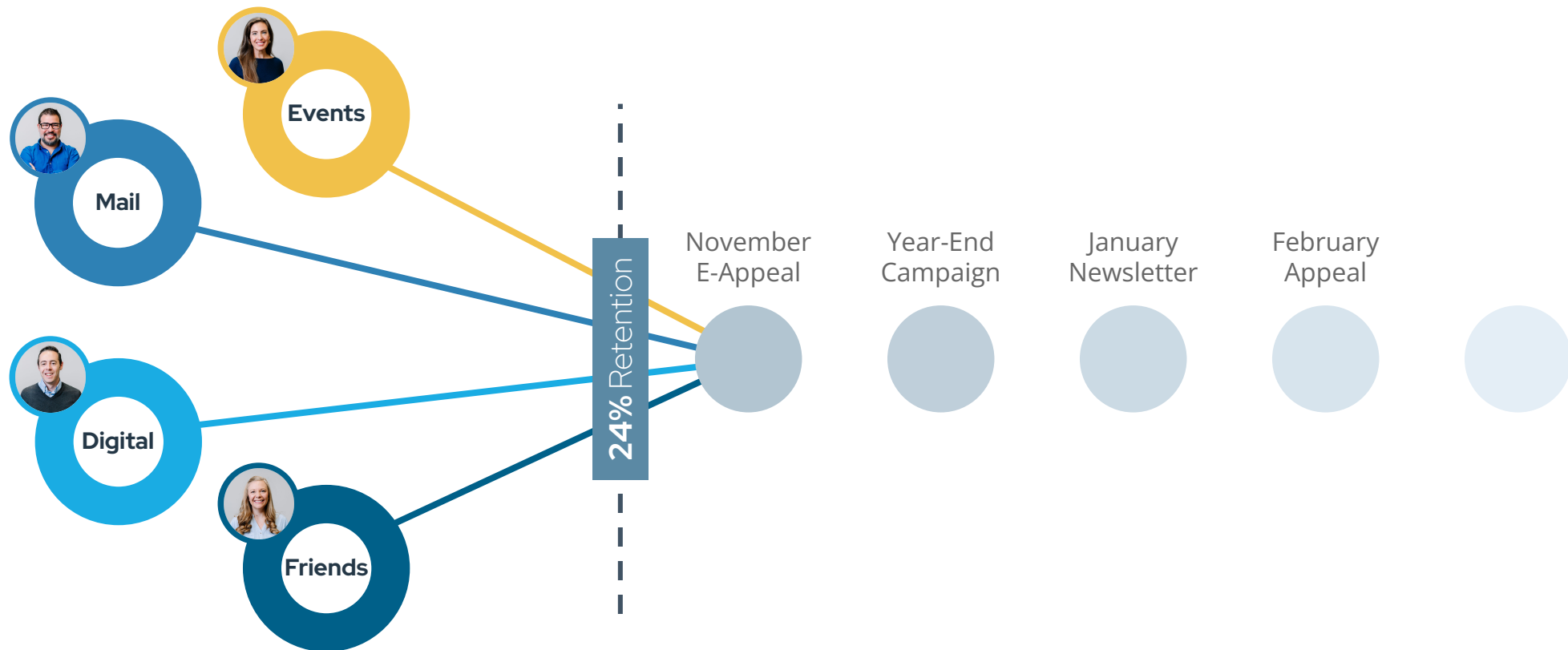
The legacy, impersonal model

Donor/Prospect Acquisition

- Personal and varied
- Based on donor's intent

Retention & Cultivation

- One-to-many ("Spray and Pray")
- One-way based on nonprofit timing.
- Disconnected from intent



Two important questions

- 1 Why do donors continue to give?
- 2 How can you cultivate this at scale?

Why nonprofits are changing...



Responsive Fundraising

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- ↑ 12% increase in retention
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*Based on aggregated results from other Virtuous customers

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Responsive Fundraising

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*Based on aggregated results from other Virtuous customers

The Insight

Donors continue to give when they feel **connected with** and have **confidence in** an organization working on a cause they **care deeply about**.



Two important questions

- 1 Why do donors continue to give? 
- 2 How can you cultivate this at scale?

The First Principles of Fundraising

Connecting supporters with your story through systems.



Supporters

Donors, Stakeholders,
Volunteers, Board, Staff



Strategies & Systems

Campaigns, Processes, Habits,
Metrics, Communications, Platforms



Story

Mission, Impact, Purpose,
Outcomes, Beneficiaries

The Fundraising Growth Model

Fundraising Growth Levers

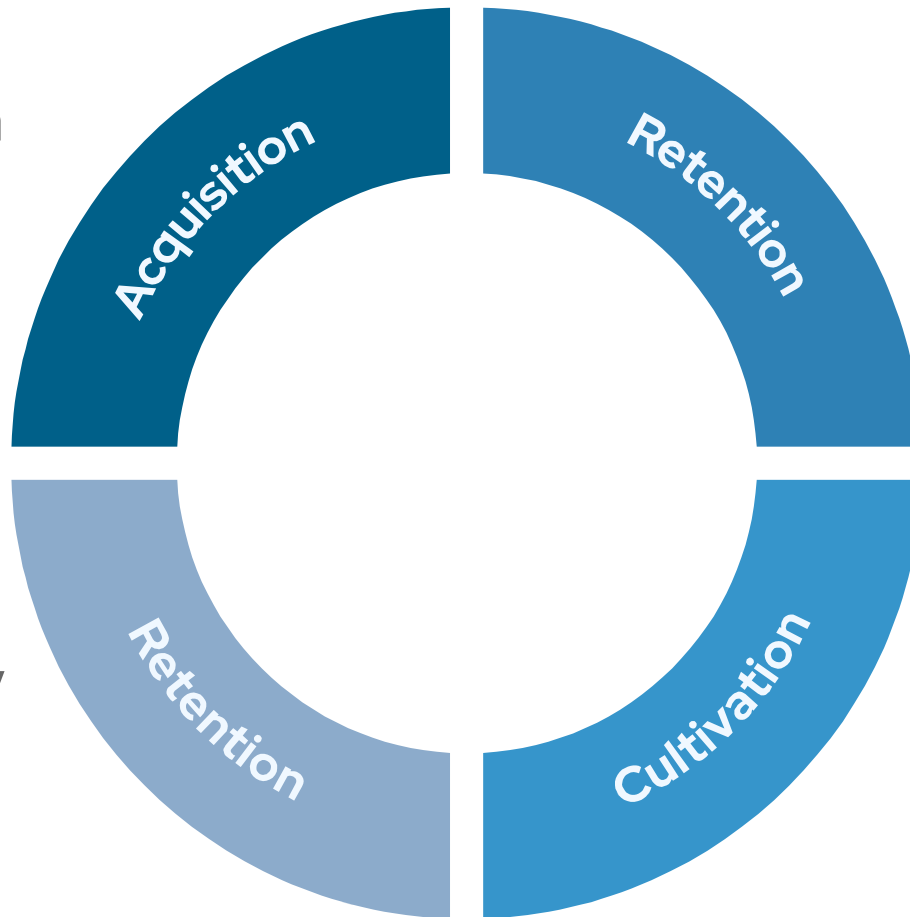
Acquisition

How you engage new donors with your nonprofit's impact.



Advocacy

How frequently your donors refer others to support your cause.



Retention

How you build lasting relationships and earn donor loyalty.



Cultivation

How you deepen the engagement each donor has with our cause.

01

Listen

Identify key signals and learn why supporters give



02

Connect

Connect personally and automate touches as needed



03

Suggest

Suggest next right step with personalized asks



04

Learn

Test and validate to become even more responsive



A better approach

Responsive Fundraising

Flourishing nonprofits are using responsive fundraising to connect personally with each supporter and unlock holistic generosity.



One important gap...

The Problem

Most nonprofits are handcuffed to **systems** and **mindsets** designed for a world that **no longer exists**.





“Every system is perfectly designed
to get the results it gets.”

How do you upend the ~~status quo~~
and lead your teams to **be responsive**?

The Responsive Model

✓ **Donor Growth Model**

Acquisition, Retention, Cultivation

✓ **Responsive Fundraising**

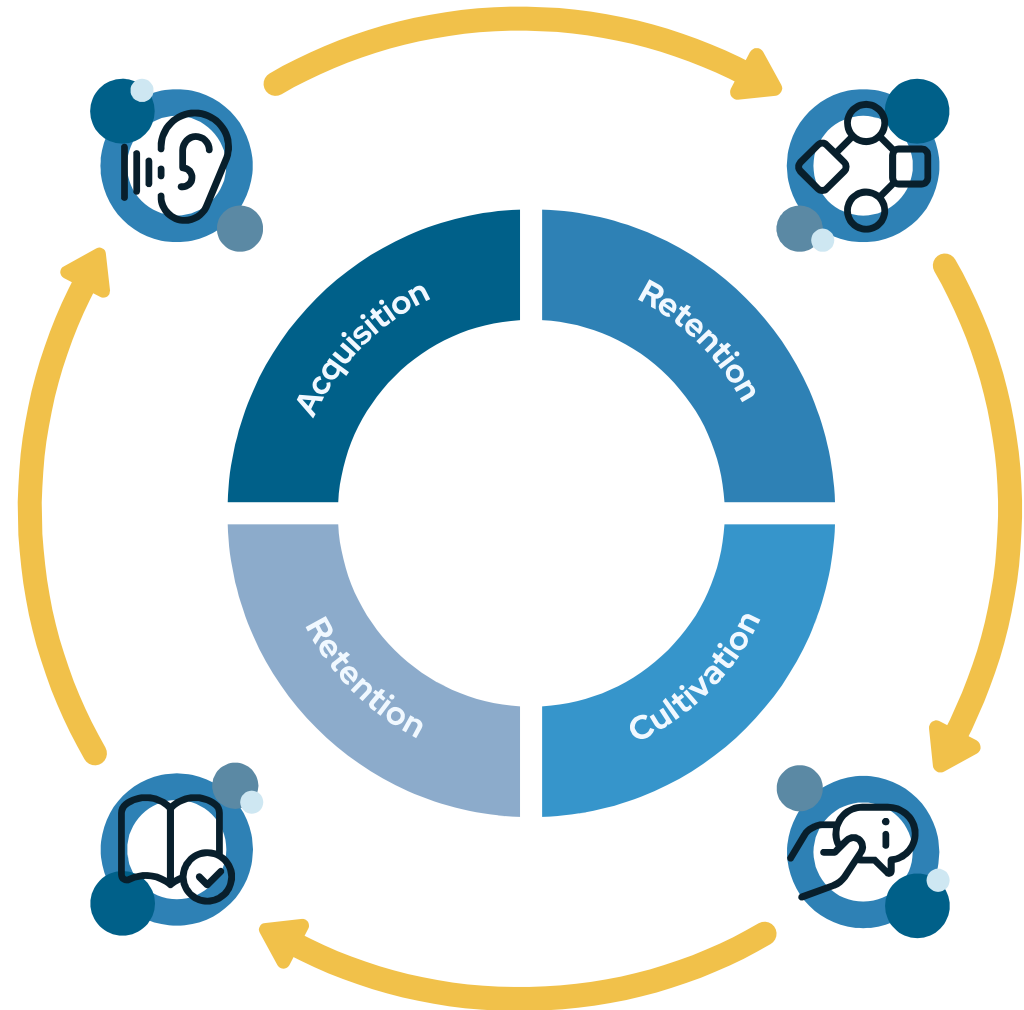
Listen, Connect, Suggest

Responsive Teams

Visibility, Collaboration, Integration

Responsive Platforms

Responsive CRM, Automation, Smart Giving, Email/Mail/Text, AI, Analytics



Responsive Mindset #1

Personal for All

From the \$10,000 to the \$50 donor, responsive teams design personalized donor journeys, and build the processes and adopt technology to treat all donors like major donors.



Imagine for a moment...

Meet Stephen

Attends 2022's Homecoming
Dinner on Campus



1 hr



Thank you email
with a survey
on interests

1 Day



Thank you call
from team

2 Days



SMS from
Program Team
based on
interests

Stephen Visits Site



1 Day



Email with
donation ask
based on page
Stephen visited

Stephen Gives!



15 Days



Postcard closing
the loop on
impact

Connection is based on timing & intent. **Multi-channel. Hyper personal.**

What if...

Barnabas



First gift to
University

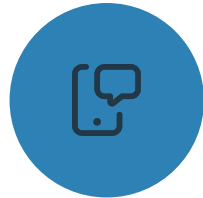


New Donor Journey

Jenna



Abandons
donation page



Online Gift Recovery

Courtney



Hasn't given
in 13 months



Lapsed Donor Journey

Neal



Clicks to email &
downloads PDF



Awareness Donor Journey

Responsive, dynamic campaigns

Donor/Prospect Acquisition

Personal. Based on Donor Timing

Donor/Prospect Acquisition

Personal. Based on Donor Timing

Invited by a friend



Story that Resonates



Fun with Friends



Urgent & Newsworthy



Personal Connection



↑ 12%
Retention

↑ 10%
Average Gift

↑
Engagement

Responsive Mindset #2

Innovate, Experiment, & Embrace Failure

Responsive nonprofits are constantly innovating, experimenting, and adapting their processes. They try new things. They embrace new ideas. And they get comfortable with failing.



Responsive Mindset #3

Focus on Trust

Every relationship thrives on trust and accountability. We all want to know the people we are supporting will do what they say and act in the ways we expect.





“Resources will tend to flow naturally toward you when you focus on the most important aspect of the fund-raising process: creating human connections.”

Jennifer McCrea | The Generosity Network

What Are You Listening For?

Three (3) types of donors signals you should listen for:

Involvement

How they engage

Interest

What they engage with

Intent

Why they engage



Brit

Active donor ~4 years
LTD Giving > \$5k
Volunteers often

Gives monthly to
women support programs

Volunteered to be a mentor
for young girls

Said in a survey that she
gives because of she saw
first-hand the value of
mentorship.



Shivani

First-time donor
Attended a virtual event
Gave \$500 online

Requested more info on
child advocacy programs

Viewed child adoption
articles on our website

Visited the website again
after being disengaged for
four (4) months.

The Insight

Donors continue to give when they feel **connected with** and have **confidence in** an organization working on a cause they **care deeply about**.

Reminder

Responsive Mindset #4

Value Motivational Insights Over Behavior

Responsive nonprofits seek out the motivation behind the behavior first. They don't value what someone is doing as much as why they're doing it.



Responsive Fundraising

Listen

The more you listen, the more you begin to understand how each person wants to connect with the cause.



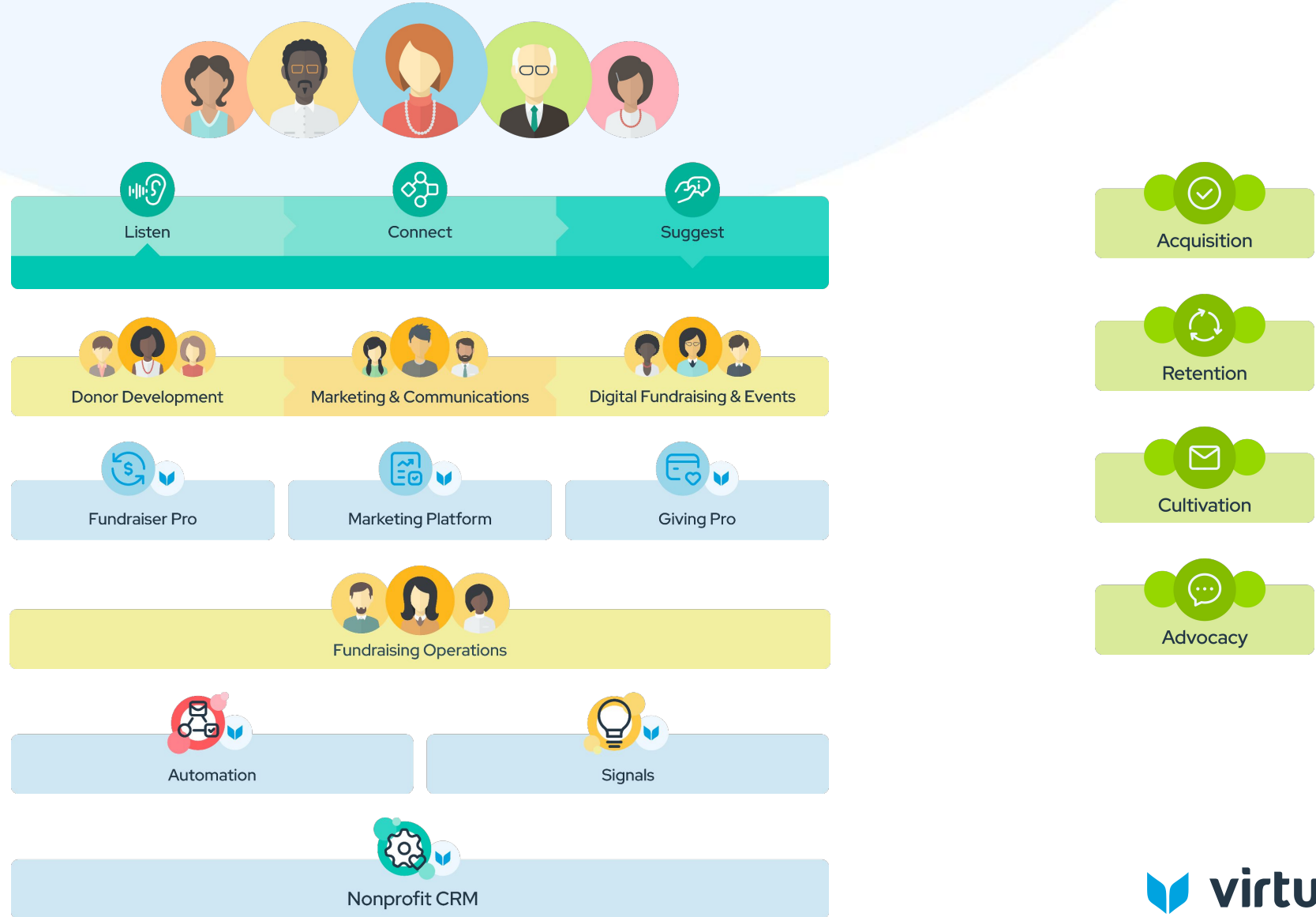
Responsive Mindset #5

Break Down Silos: People & Data

Silos between programs, fundraising, and communications departments no longer serve your organization, donors, or beneficiaries. The more crossover between teams, the more responsive your organization can be.



How Virtuous Enables Responsive Fundraising



Responsive Mindset #6

Be Abundantly Thankful

Generosity begets generosity. This means giving back to your donors even more than they give to you — prioritizing your relationship over their money.

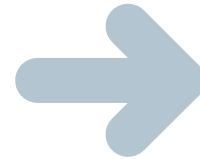


Responsive Mindset #6

“Thank You” Works



Thank you call



Responsive Mindset #7

Design Plans to Adapt & Stay Curious

True responsive nonprofits keep changing, innovating, and adjusting. They are always looking to the future.







“Some organizations will thrive from this **increased chaos**, some will be unprepared, and some will merely fight it and lose.”

Responsive Mindset #8

View Generosity Insights Over Behavior

Responsive nonprofits need to embrace a shift in mindset that moves away from treating generosity as a transaction and instead recognize it for the meaningful experience it is.



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But wait, there's more!



virtuous



onecause[®]

**Virtuous announces
integration with OneCause.**

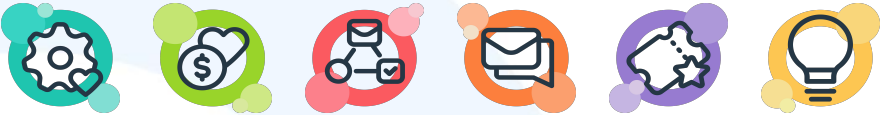
LEARN MORE AT [VIRTUOUS.ORG/ONECAUSE](https://virtuous.org/onecause)

The best nonprofit CRM meets the best auctions and events platform!



- Create new contacts
- Update existing contacts
- Capture event information in a contact's feed
- Sync auction items
- Sync gifts/donations

[Learn More Here](#) 



The Responsive Fundraising Platform



Nonprofit CRM

- Donor Management
- Gift Pipeline & Forecasting
- Dashboards & BI Reporting
- Email Integration
- Query & Data Health Tools
- Grant Management
- Volunteer Management
- Custom Fields & Objects
- API and Integrations



Automation

- Email Automation
- Letters/Postcards on Demand
- SMS Automation
- Donor Journey Builder
- Process Automation
- Best Practice Templates
- Automate Tasks, Notes & Calls
- Real-Time Segmentation



Giving

- Personalized Donation Forms
- Integrated Payments
- Landing Pages
- Smart Gift Arrays
- Self-Service Donor Portal
- PCI Compliance & Security
- Premium & Lead Forms



Signals

- Wealth Data
- Lead Scoring
- Pre-Lapse Predictors
- Personalized Emails
- Social Integration
- Actionable Data Insights
- Web & Email Tracking



Events

- Ticketing & Registration
- Branded Event Pages
- Event Management
- Day-Of Attendance Tools
- Reporting & Dashboards
- Sponsorships & Donations
- Flexible add-ons & custom fields



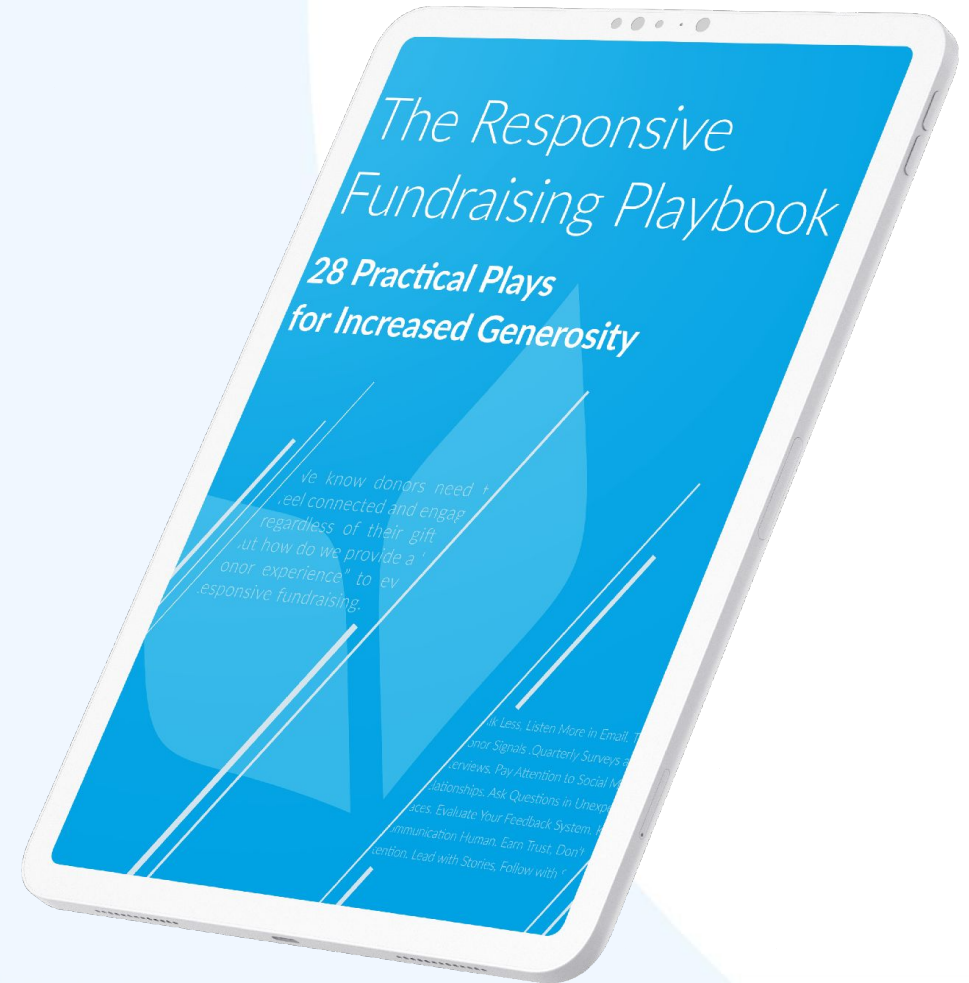
Marketing

- Email Marketing
- SMS Marketing
- Marketing Analytics
- Receipting
- Direct Mail Segmentation
- Template Library
- Campaign Management

The Responsive Fundraising Pack

Send an email to Erik.Tomalis@virtuous.org with subject line **“Responsive Fundraising”** and we’ll send you:

- ✓ A 30-minute video showcasing the why and how of responsive fundraising
- ✓ The 100+ Page Responsive Fundraising Blueprint & Playbook
- ✓ A self-paced Responsive Assessment to benchmark your nonprofit’s fundraising



Want it right now?
Scan this QR code!

Enterprise Ready

Built for Scale



Advanced Security

- Two Factor
- Full Encryption
- HIPAA
- 3rd Party Audits



App Marketplace

- 20+ Integrated Apps
- Zapier Integration



Customizable

- Custom Objects
- Custom Fields
- Permissions-based Configuration



Reporting/BI

- Report Writer
- Customizable Dashboard
- Integrated data analytics



API

- RESTful endpoints
- Full app coverage
- Web hooks



Payments

- Online/Offline processing
- Reconciliation
- Custom rules

A partner for your success

From onboarding centered on your organization's goals to personalized training and ongoing support.

"Outstanding customer service! In 30 years of fundraising leadership I have never seen this level of service from a nonprofit technology partner."



– **John Cerniglia**
SVP & Chief Development Officer



Data Migration Expert



Support & Training Specialist



Customer Success Coach

**Virtuous is a software
company committed to
helping nonprofits
grow *generosity.***



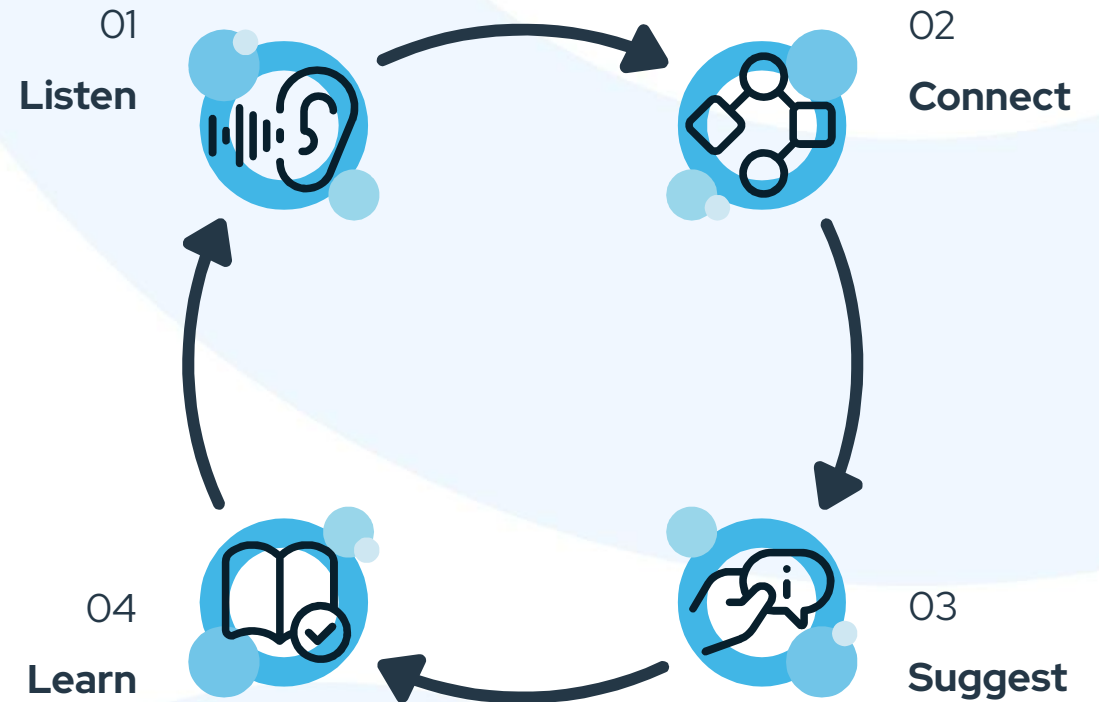


Responsive Fundraising

How Nonprofits Grow with Virtuous

Donors now expect **personal connection** to the causes they care about.

Growing nonprofits are leveraging responsive fundraising to build better donor relationships.



Visit us at booth #103 to learn more