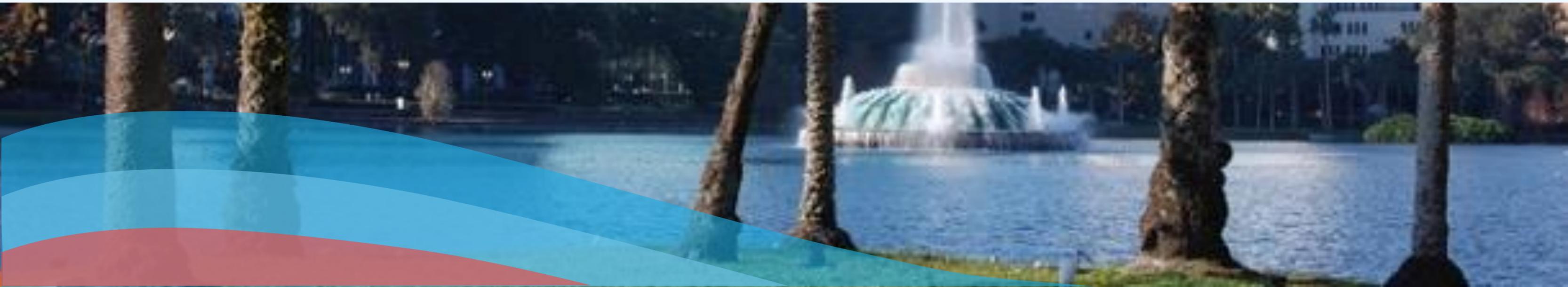




The Donor Journey Explained:

A Roadmap to Grow Generosity at Scale



Today's speakers



Daniel Sullivan

Director of Philanthropy
Parkland Health Foundation

LinkedIn 



Erik Tomalis

Director of Business Development

Virtuous
LinkedIn 



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

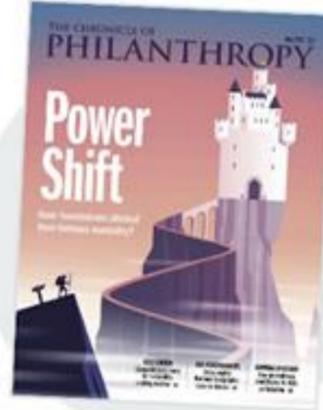
2022 IN PHILANTHROPY

FRESH FACES



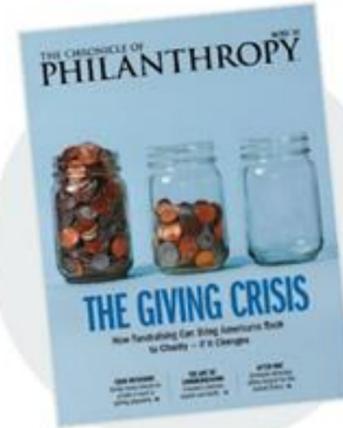
FEBRUARY

POWER SHIFT



MAY

THE GIVING CRISIS



JULY

FUNDRAISERS WANTED



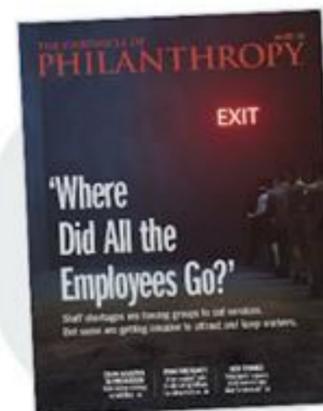
NOVEMBER

MARCH



THE FIERCE FIGHT FOR CLIMATE PHILANTHROPY'S FUTURE

JUNE



"WHERE DID ALL THE EMPLOYEES GO?"

SEPTEMBER



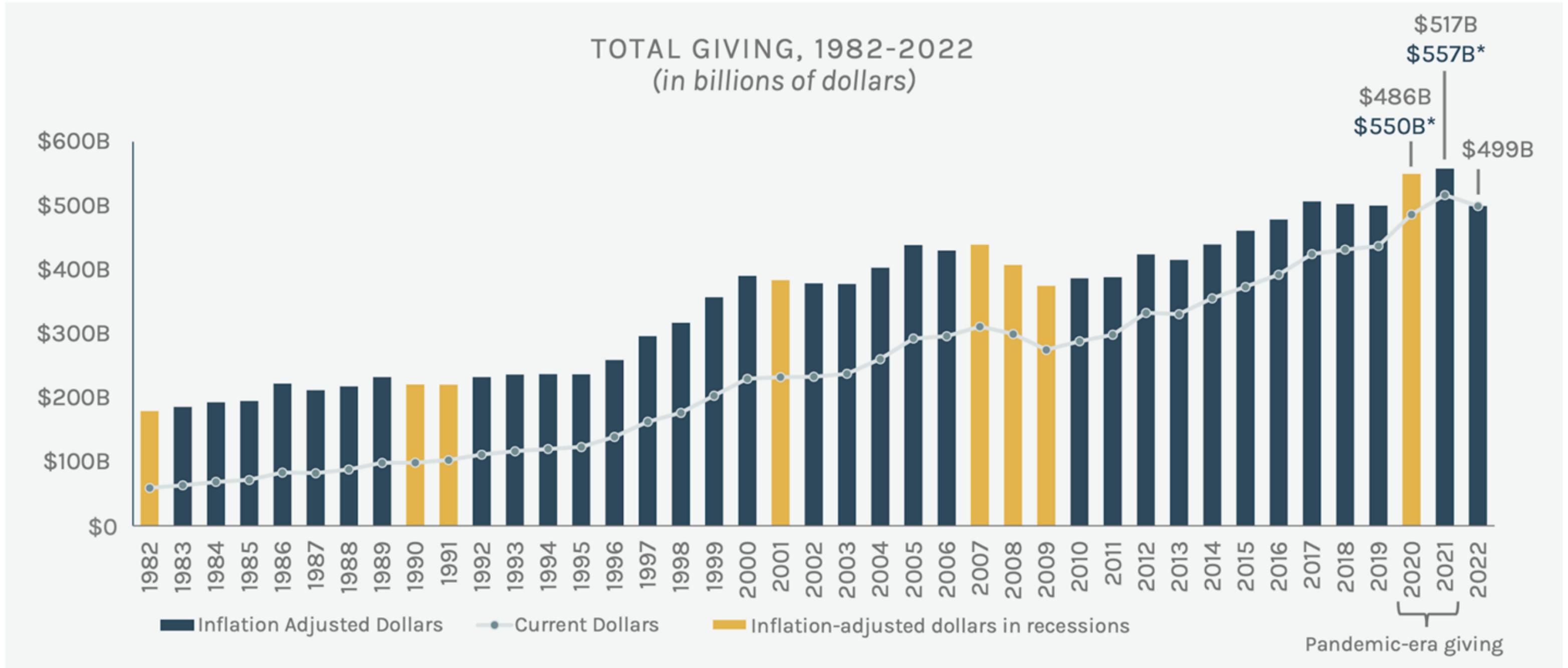
VOLUNTEERS: WHY AND HOW CHARITIES SHOULD REVIVE A DECLINING BUT VITAL SOURCE

DECEMBER



THE FUTURE IS NOW

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



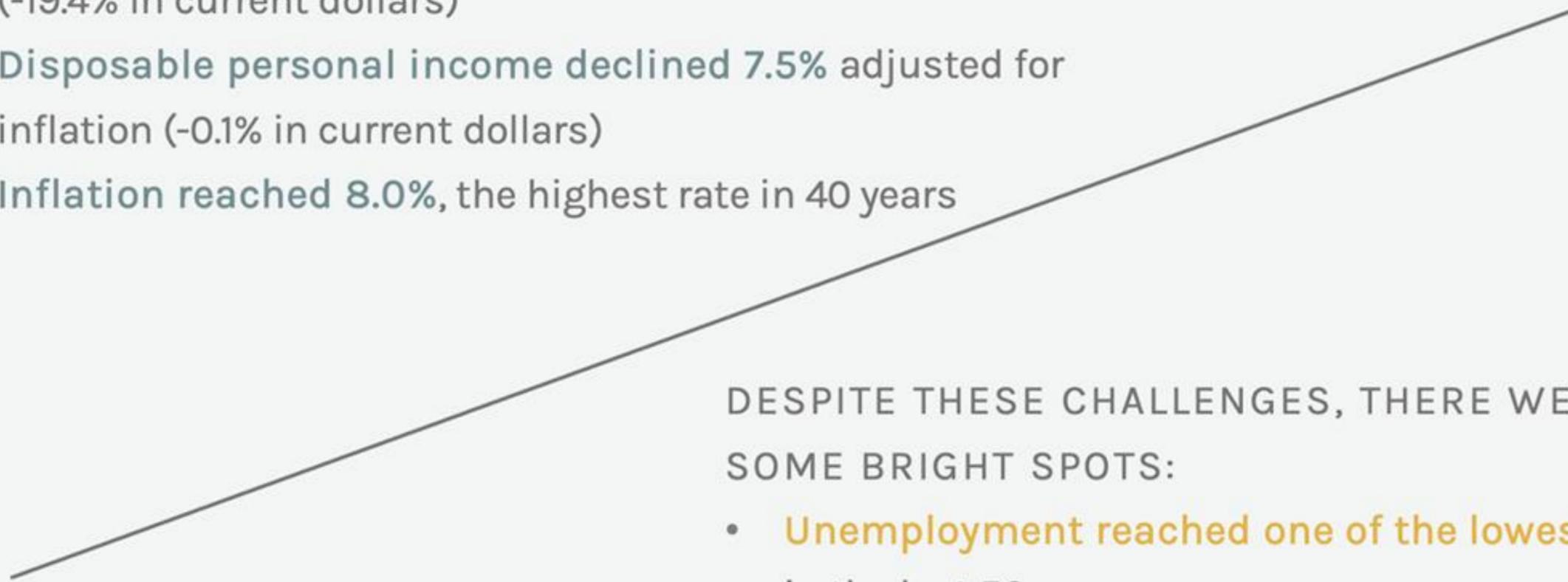
*Inflation adjusted dollars

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

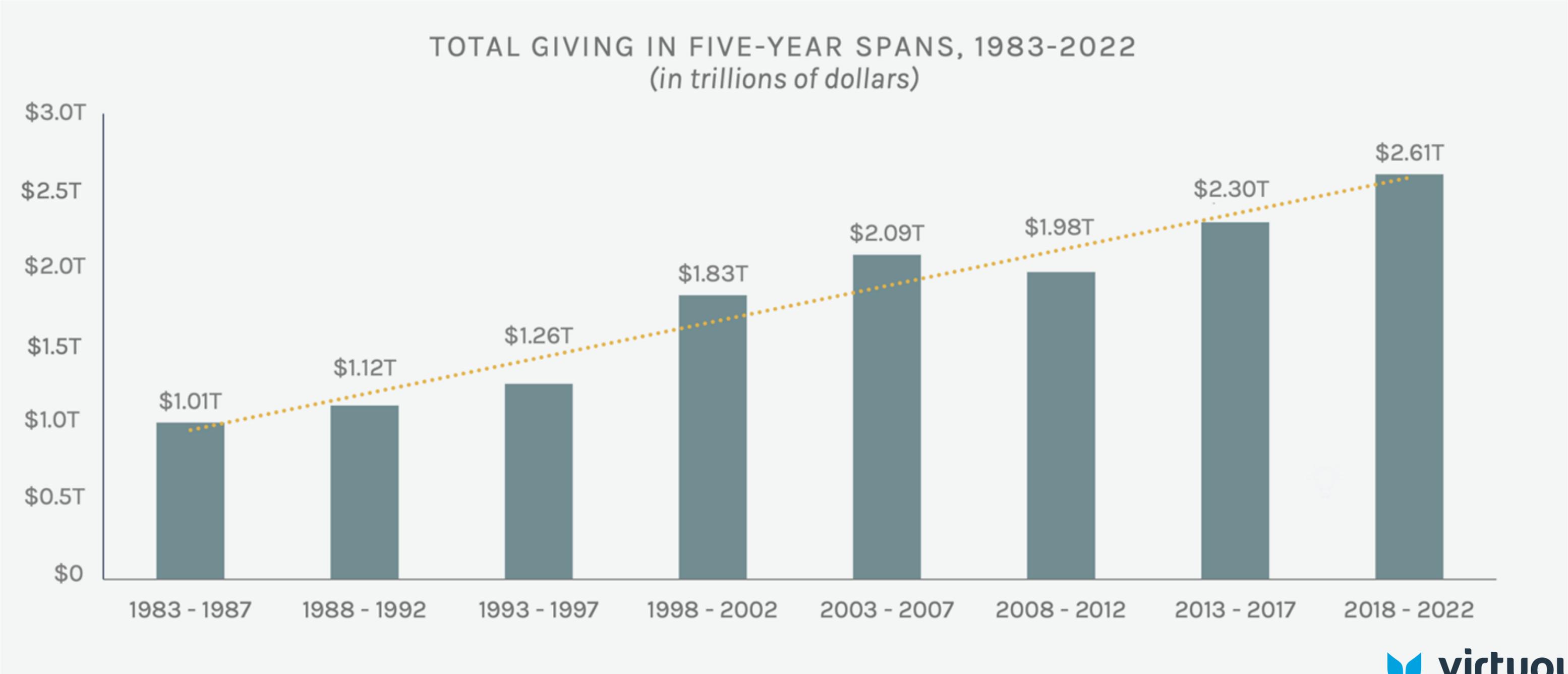


DESPITE THESE CHALLENGES, THERE WERE SOME BRIGHT SPOTS:

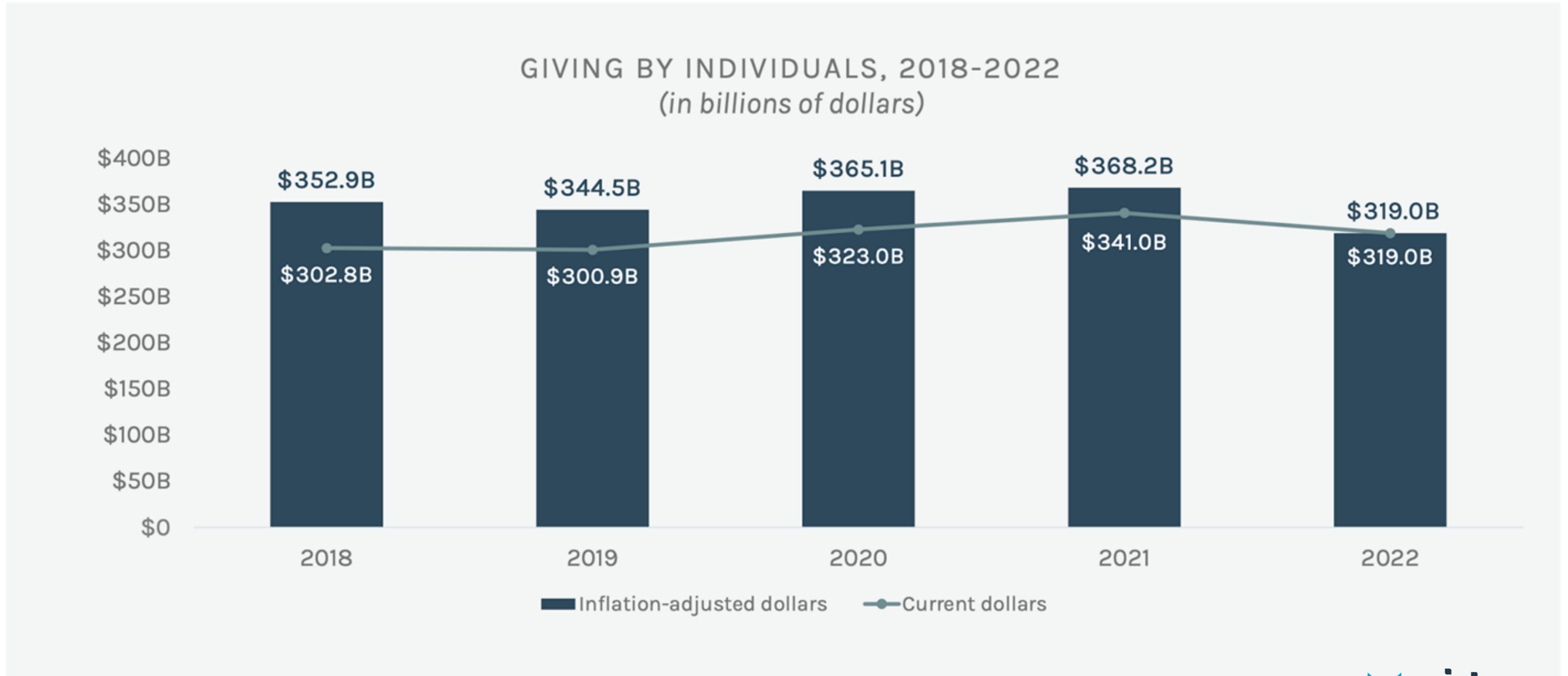
- **Unemployment reached one of the lowest rates** in the last 50 years
- **GDP grew 1.1%** adjusted for inflation (9.2% in current dollars)



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

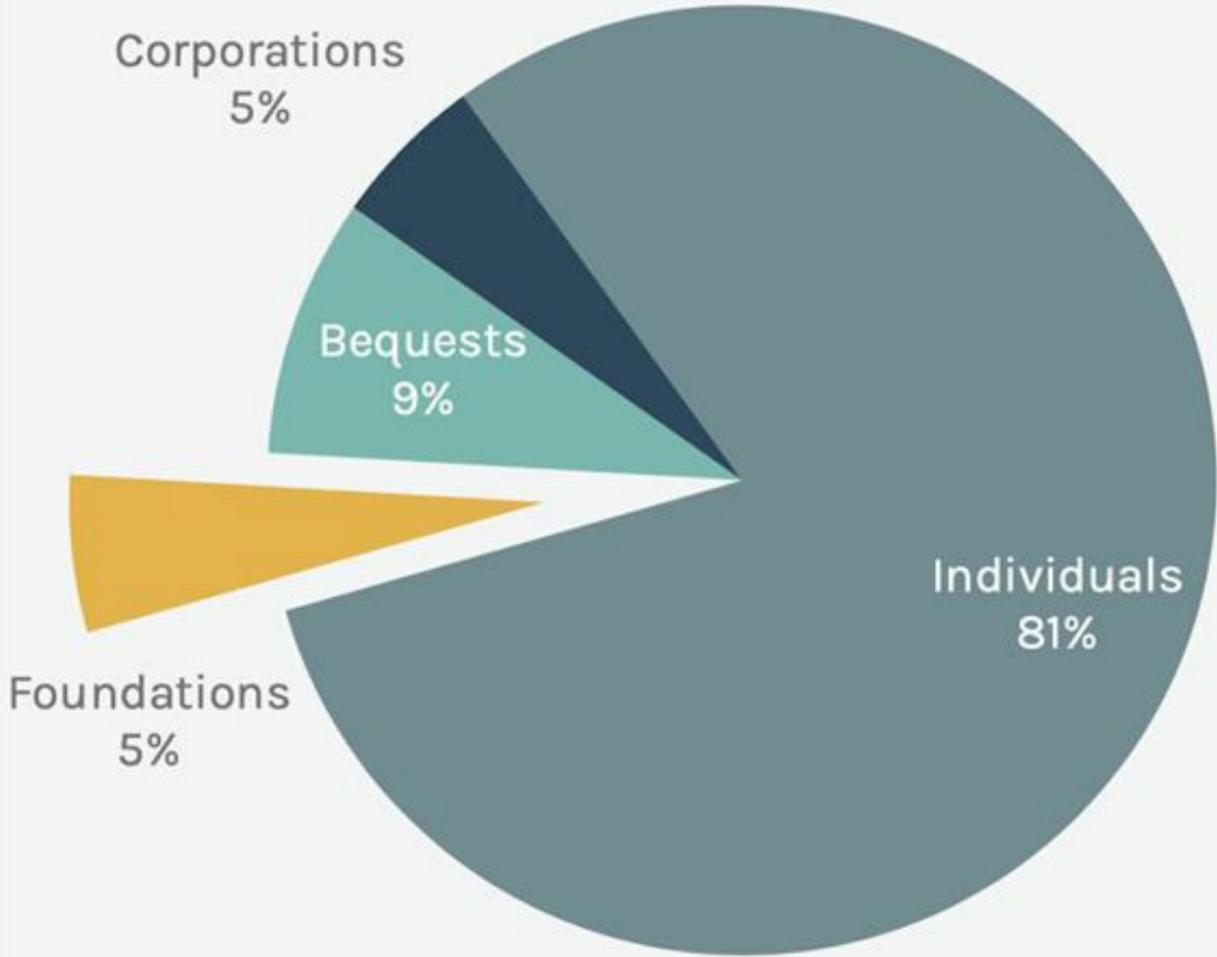


Giving by individuals experienced decline after two of the most generous giving years on record

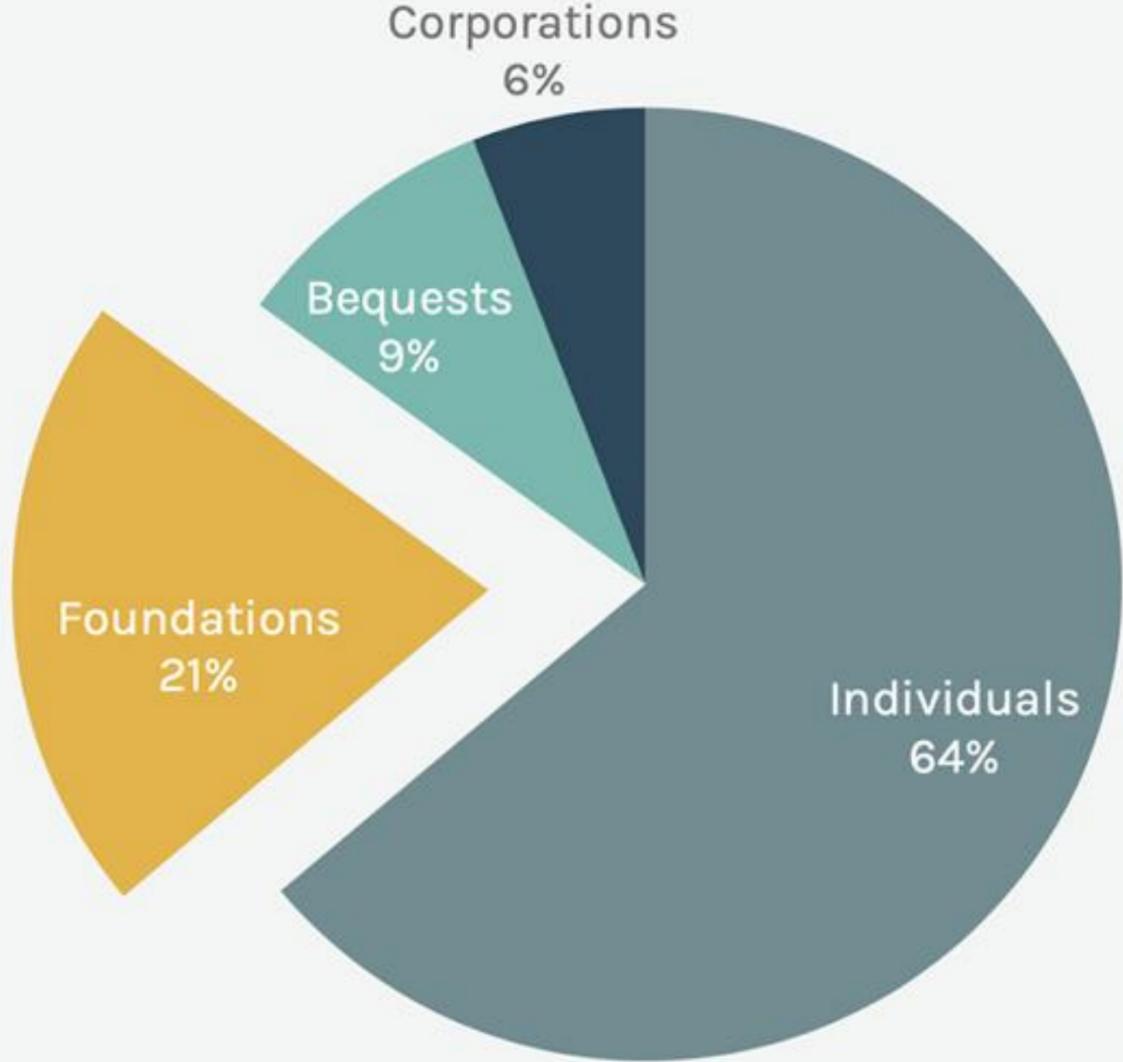


Giving by foundations is growing as a share of total giving

1982 CONTRIBUTIONS BY SOURCE



2022 CONTRIBUTIONS BY SOURCE



generosity

The word "generosity" is written in a white, cursive script. It is surrounded by multiple layers of thick, hand-painted brushstrokes in a rainbow color palette (red, orange, yellow, green, blue, purple). The background is a dark teal color with faint, large-scale circular patterns. In the bottom-left corner, there are two overlapping curved lines in shades of cyan and light blue.





“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.”

Eglantyne Jebb | Founder of Save the Children

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?

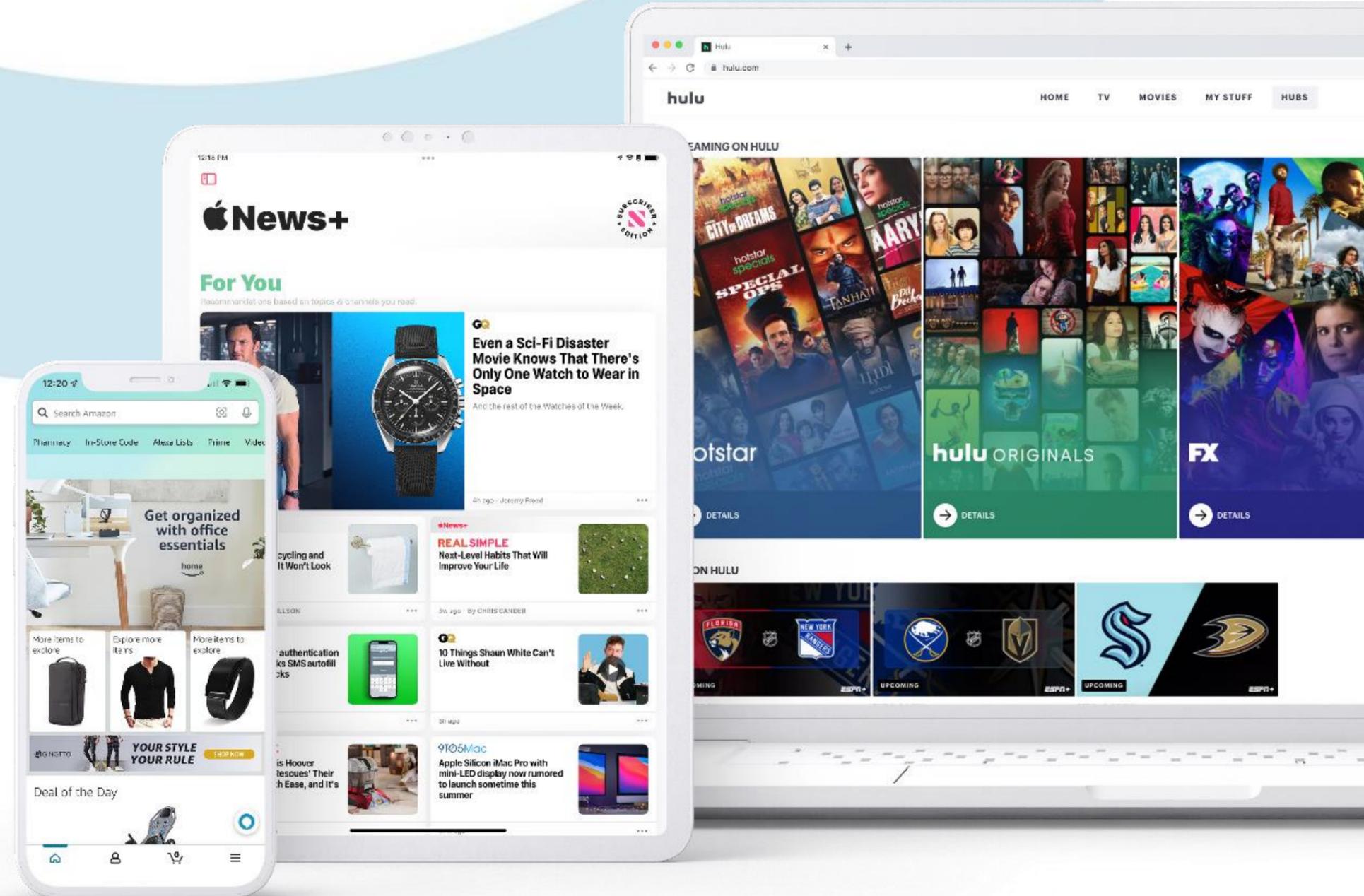
Shift from mass communications to personal, responsive experiences.

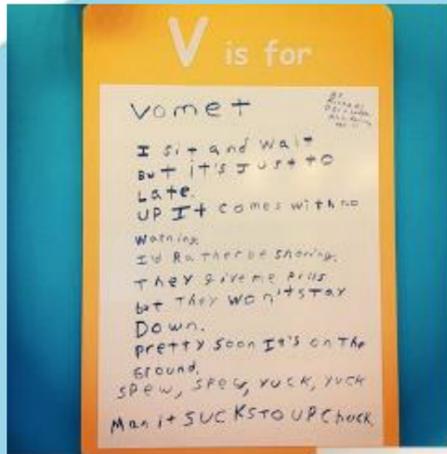
✔ Personalized experiences

Moving away from one-size-fits-all

✔ Two-way, behavior driven

Triggered in response to data signals





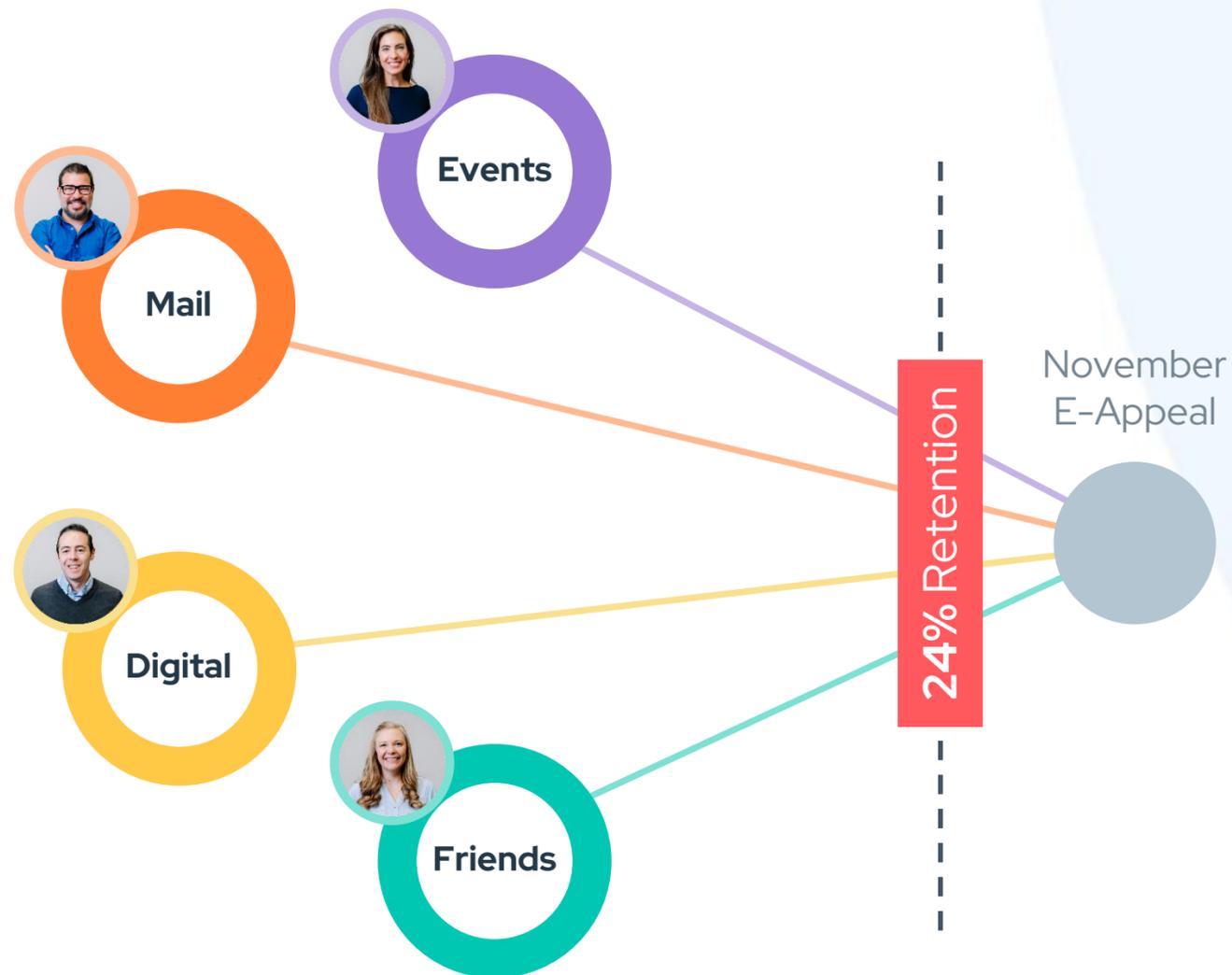
Giving is personal

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

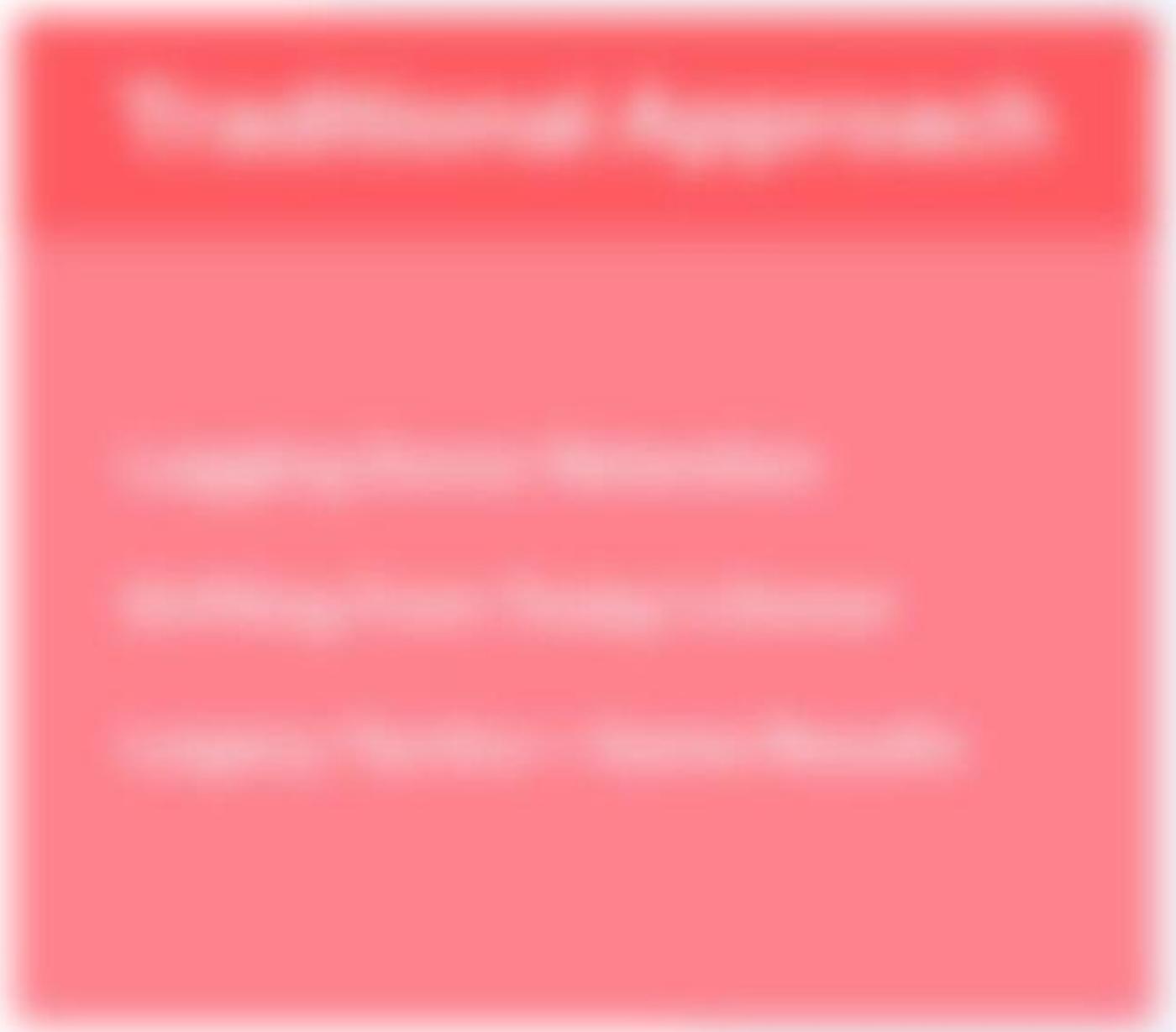
- One-to-many ("Spray and Pray")
- One-way based on nonprofit timing.
- Disconnected from intent



Two important questions

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

Why nonprofits are changing...



Responsive Fundraising

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

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

Responsive Fundraising

- ↑ 10% increase in average gift

- ↑ 12% increase in retention

- ↓ 20% decrease in staff time

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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?

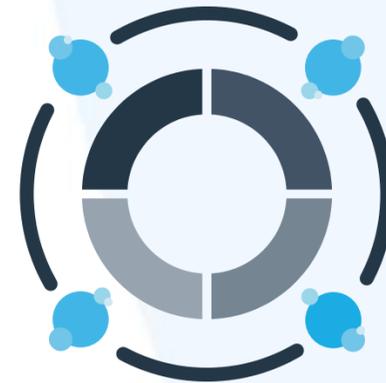
The First Principles of Fundraising

Connecting supporters with your story through systems.



Supporters

Donors, Stakeholders, Volunteers,
Board, Staff



Strategies & Systems

Campaigns, Processes, Habits,
Metrics, Communications, Platforms

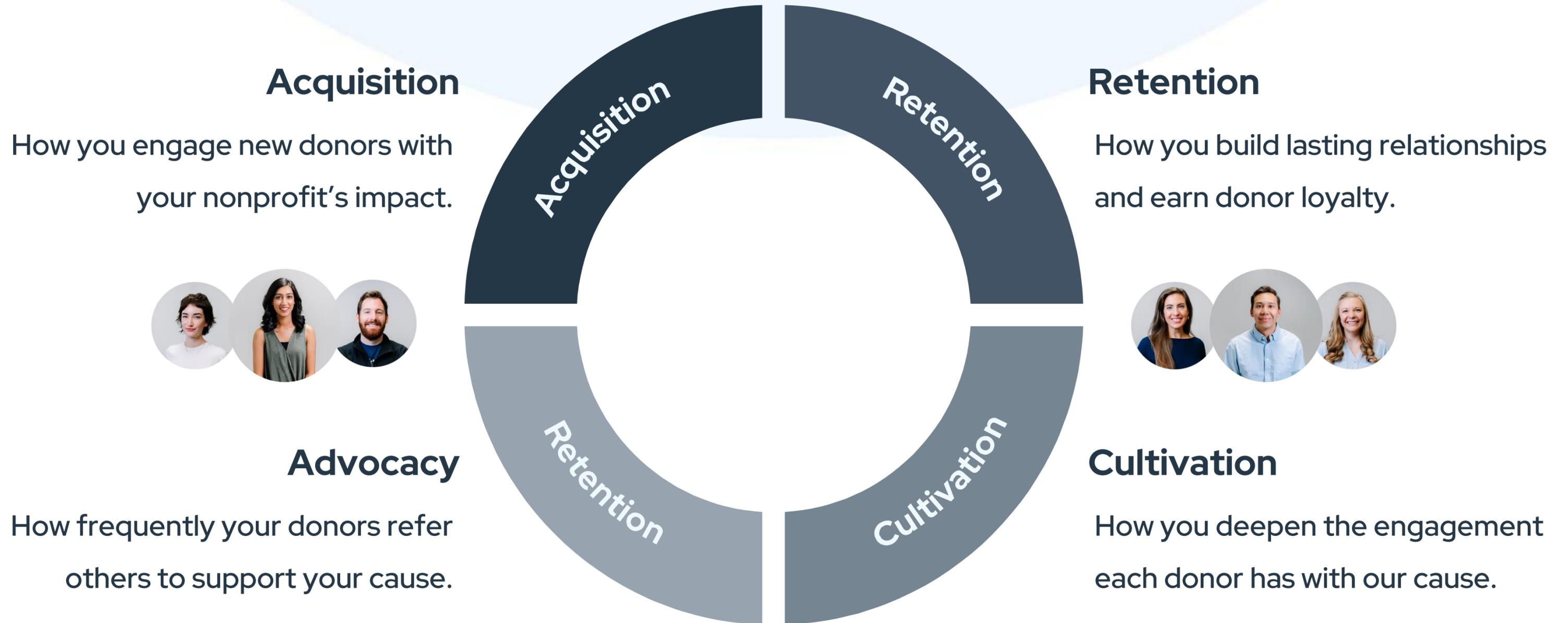


Story

Mission, Impact, Purpose,
Outcomes, Beneficiaries

The Fundraising Growth Model

Fundraising Growth Levers



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.”

Paul Batalden | MD, Researcher, Healthcare



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

The Responsive System

✓ Donor Growth Model

Donor Growth Model

Acquisition, Retention, Cultivation

✓ Responsive Fundraising

Listen, Connect, Suggest

Responsive Teams

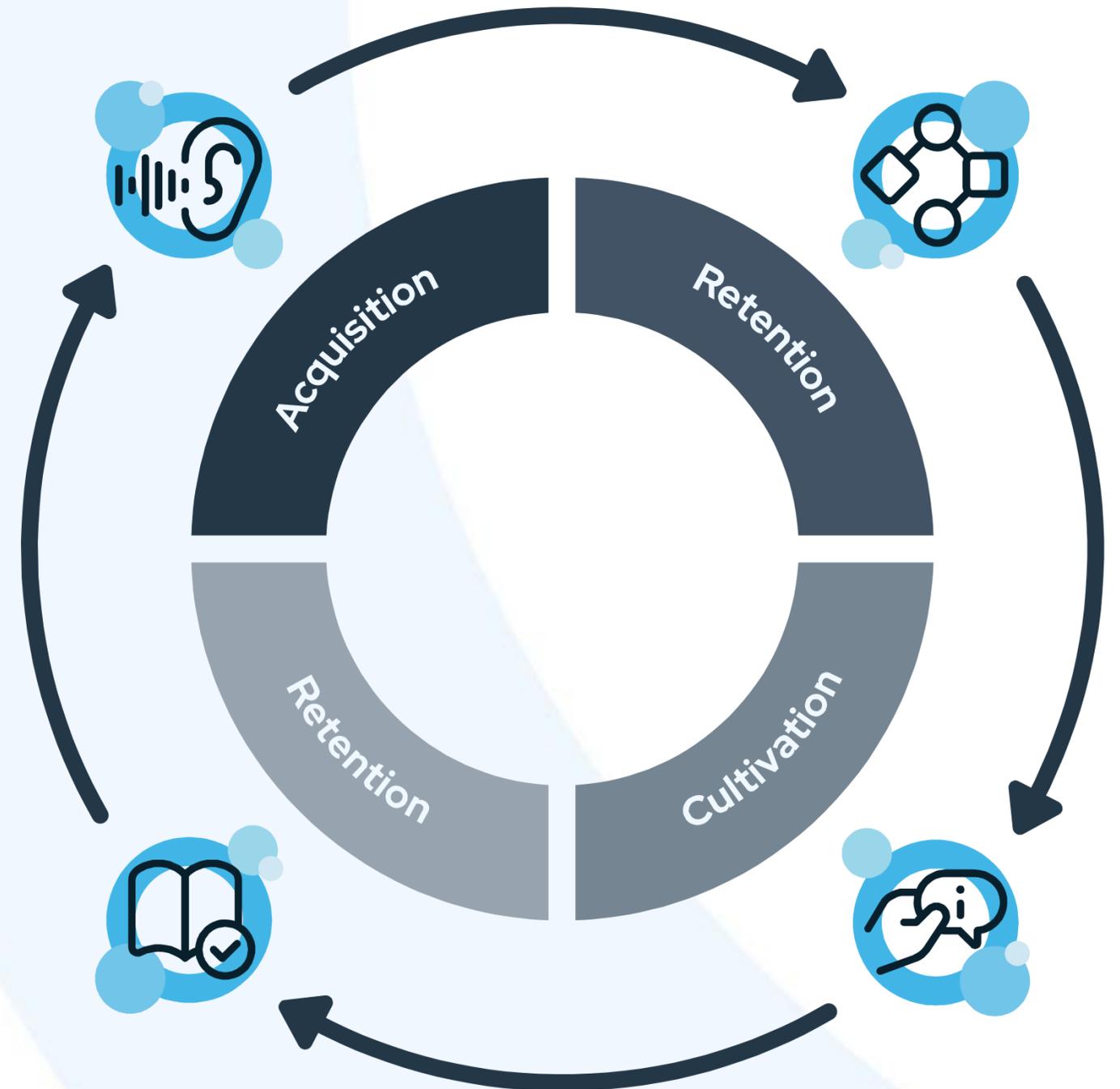
Visibility, Collaboration,

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 2023's
Glimmer of Hope Gala



1 hr



TY 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 w/ 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 Health System



New Donor Journey

Jenna



Abandons donation page



Online Gift Recovery

Courtney



Hasn't given in 13 months



Lapsed Donor Journey

Neal



Grateful Patient Journey

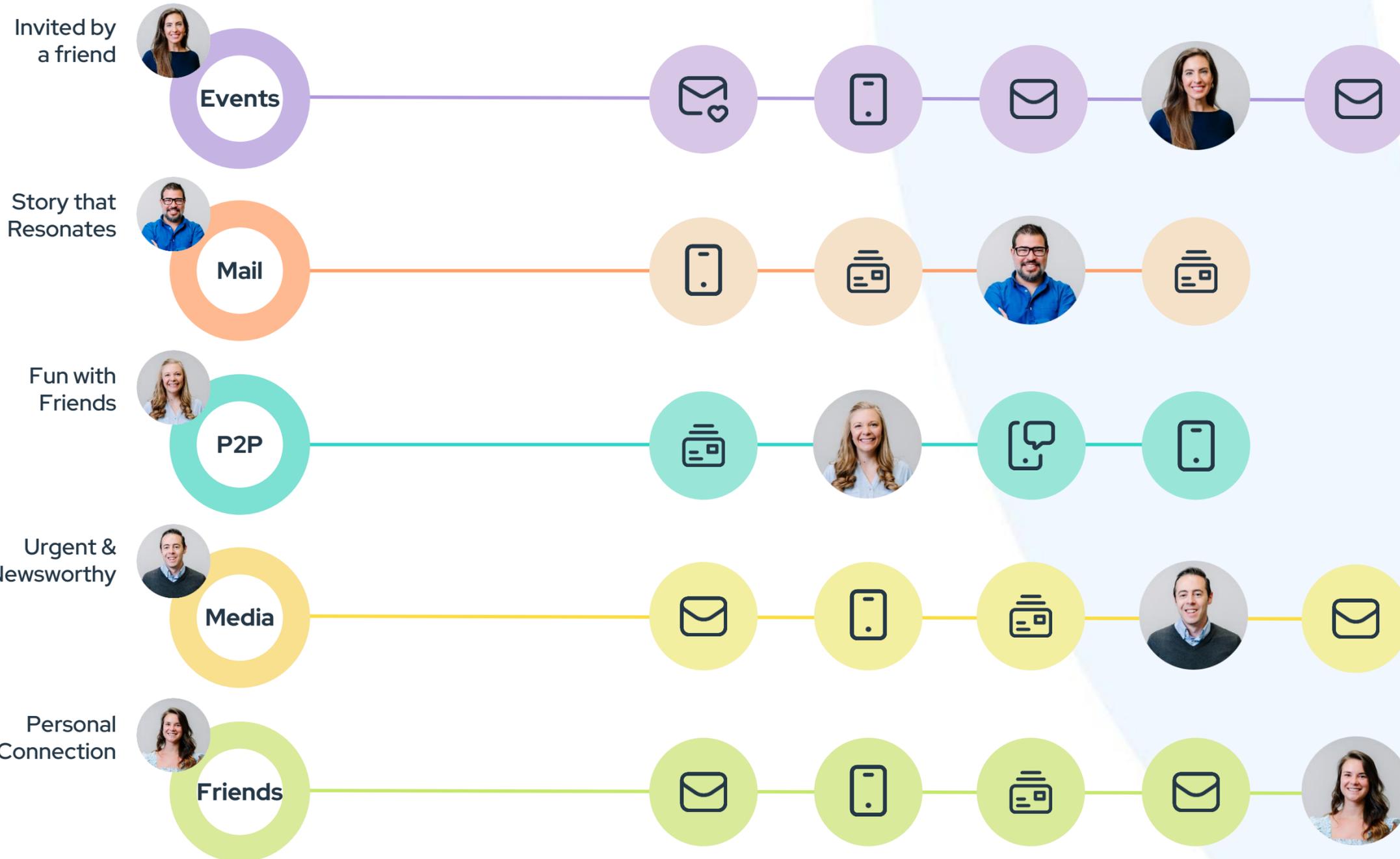


Awareness Donor Journey

Responsive, dynamic campaigns

Donor/Prospect Acquisition
Personal. Based on Donor Timing

Donor/Prospect Acquisition
Personal. Based on Donor Timing



↑ 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

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.



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.

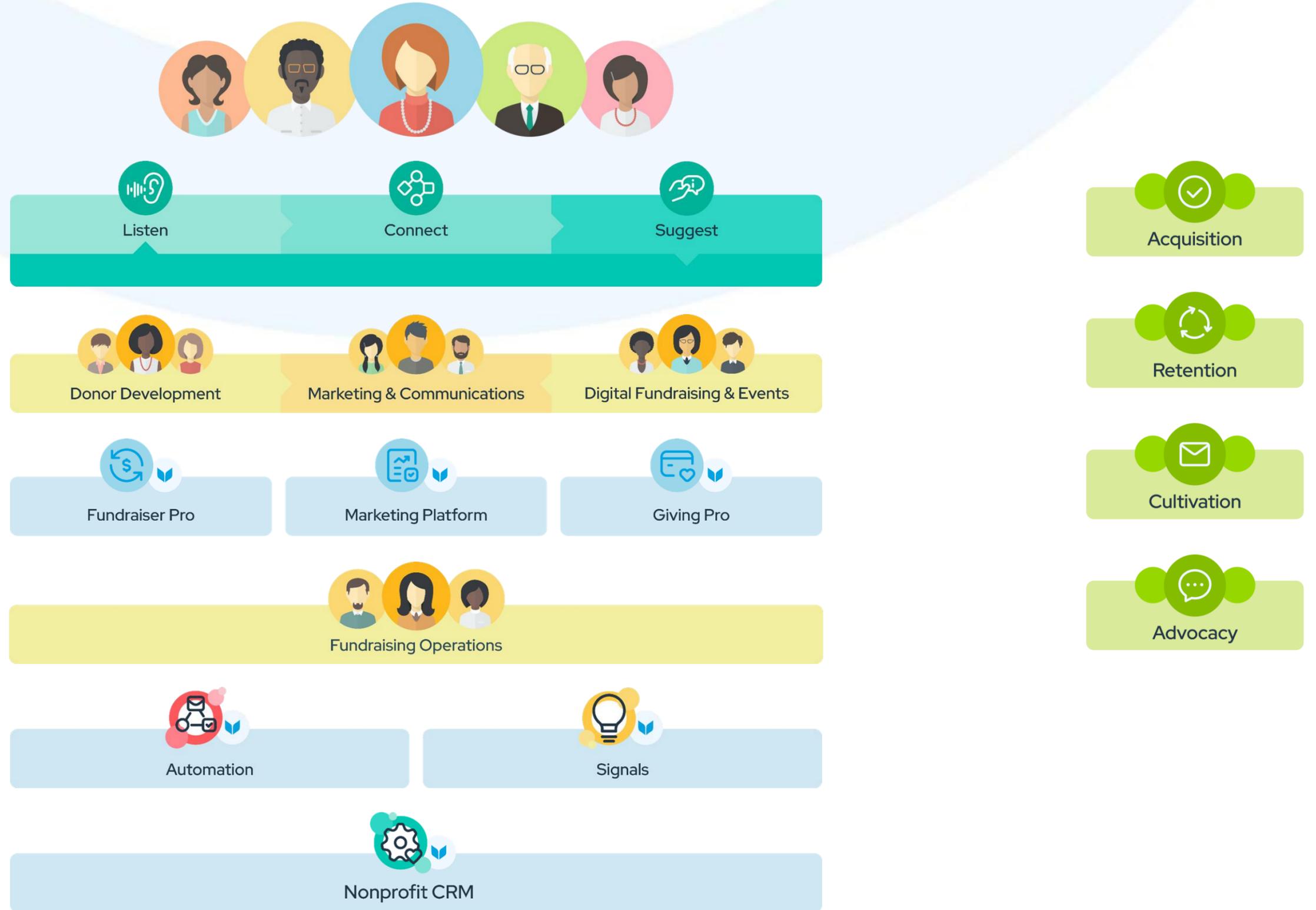
Responsive Mindset #5

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

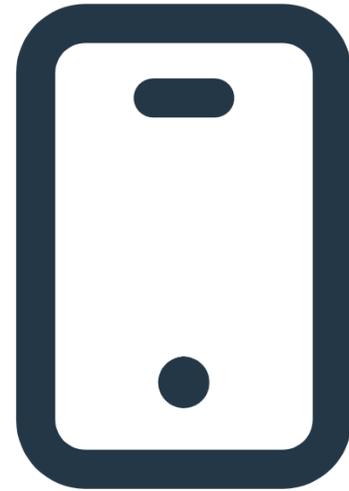
Be Abundantly Thankful

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



Source: Penelope Burk's 'Donor Centered Fundraising'

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.”

Seth Godin | Marketer, Innovator, Author



Responsive Mindset #8

View Generosity Beyond A Transaction

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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responsive fundraising

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Erik Tomalis

Chief Evangelist & Director of Business Development

Erik.Tomalis@virtuous.org

412-427-9834



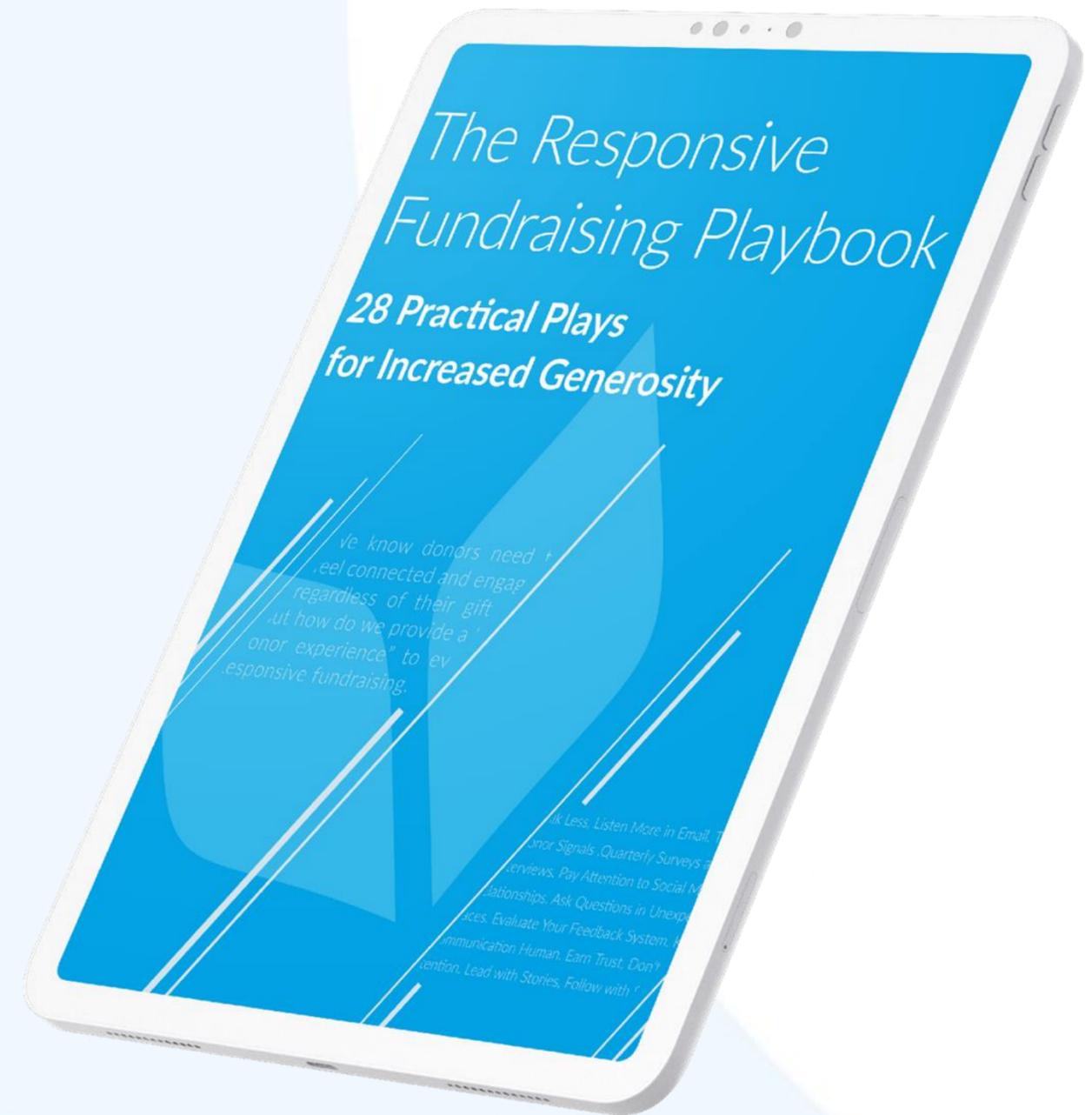


Questions?

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!