



CONVERGE | 22

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Monday, October 10th

The Philanthropy Revolution

What we are going to talk about today:

- Lisa's Experience Becoming a Major Donor
- Transactions vs Relationships
- Increase the Size of Your Donor Base
- Get to Know Your Donors (the right way)



1% Overnight: My Story

- Studio Executive, Serial Entrepreneur, Volunteer & Donor, MBA, Mother of Five
- Joined the 1% overnight after IPO
- Attempted to give TWO Major Gifts to causes with personal meaning
- Shocked at sector norms – like “The Ask”



YOU HAVE JUST
CROSSED OVER INTO...

THE
TWILIGHT
ZONE



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Now I'm *Saving Giving*

*With an \$8.8 trillion transfer of wealth over the next two decades, \$160B sitting in donor-advised funds, and 81% of first-time donors **not** giving the next year, philanthropy needs nothing short of **a revolution** to survive.*



Fundraising & Donor Relationships

It's critical to understand how donors feel in order to

Build Authentic Relationships

and

Pitch Effectively and not Turn Donors Off



But What if Donors Sense Chaos?

- Donors can sense if an organization is dysfunctional or not aligned
- Organizations that don't have their act together turn donors off
- If you can't handle your office and your team, how can you handle everything else?



Can you Believe it?

- Direct Mail that Negates Donor Goodwill
 - Misspelling names
 - Thanking donors for gifts they didn't make
 - Asking donors for money the day after they gave
 - Mailings that obscure the name of the organization or what they do
- Absent Recognition of Donor Gifts – Jack's research donation
- Poorly Planned Pitches – “Where's your money from?”
- False Pretenses – “friendraising” not fundraising



Get to Know Your Donors

- **Effective Communication**
 - ALWAYS include your organization's name on all emails
 - Don't copy and paste or mix fonts on a "personalized" email – it appears thoughtless
 - There's a bcc for a reason – it's inappropriate to see other donors' names and email addresses



Get to Know Your Donors

- Take Advantage of Google
 - Do a five-minute Google search on a prospect before any initial meeting
 - Set a Google alert for your donors and volunteers to recognize any achievements



Get to Know Your Donors

- **Send a Survey to your Donor Base**
 - How do they want to be communicated with?
 - How do they want to be addressed?
 - How often do they want progress updates?



Broaden Your Reach & Methods

- 618k Millennial Millionaires
- 60% of wealthy people in the U.S. are first generation wealthy
- \$160B sitting in donor-advised funds
- 45% of Millionaires in the US are women
- Monthly donors give 7x more than one-time donors – Recurring gifts are more likely to be initiated in January than in December
- 80% of volunteers give money to the organization they volunteer for



Revolutionize How We Interact with Donors

- Embrace change and revisit all of the marketing you do
- Think about how a donor feels (hint, hint, it's about how you would feel)
- Look at donors as individuals
- Ask about and honor a donor's preferences
- Transactions ≠ Relationships



Build a Better Fundraising Future

Looking into the future, we can't wait to make substantive change in how we "do business"

We must make change now.





THANK YOU!

Connect with me!

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