



WELCOME TO

CONVERGE | 21

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Agenda Day 2

THEME: TRANSFORMATION

01

WELCOME + KICK OFF

02

DIGITAL: THE GREAT INTEGRATOR

03

CONVERSATION: KEY LEARNINGS FROM VIRTUAL
AND HYBRID EVENTS

04

TRANSFORMATION: MID & MAJOR GIVING

05

WORKING LUNCH: WHAT WILL I TRANSFORM?

06

COMMUNITY: PUTTING IT ALL TOGETHER



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Wiland



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Pursuant



Digital: The Great Integrator

Jennifer Ingram and Kacey Crawford



What we will discuss

What Brings Us Here

The 3 Cs

Wrap-up

Q&A

What Brings Us Here

Things dramatically changed in digital fundraising over the past 18 months

- More budget from other sources
- More viable channels available
- More ways to communicate despite isolation in shutdown
- Digital no longer a “nice to have” or add on

While opening opportunities, there are challenges as well

- Apple’s iOS15 privacy measures
- Google’s phase out of third-party cookies
- Organization goals, staffing, and infrastructure not ready to meet the moment
- No available budget for new opportunities

THE 3 Cs

Community

The digital world has power because it has dynamic information, but it's important that we stay human instead of being another machine sitting in front of a machine. ~ Pranav Mistry

- Leveraging data to help overcome challenges and find new communities
- Meeting these people and communities where they are
- Questing after the Holy Grail of fundraising – younger and more diverse with a propensity and capacity to give
- Seizing the opportunity with Covid donors

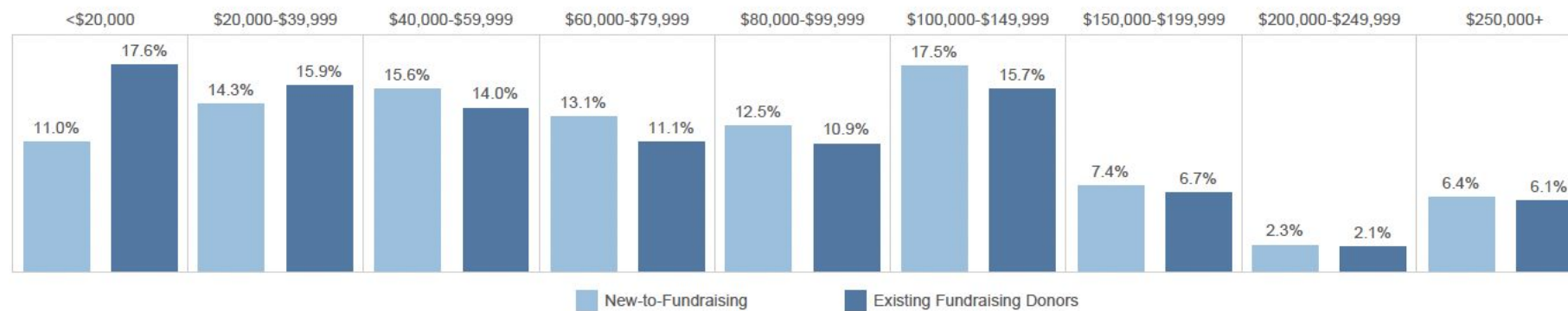
New-To-Fundraising vs. Existing Donors

In this report we are looking at two groups of donors. The first group consists of those who gave their very first donation during the period 3/15/2020 to 3/14/2021 (New-to-Fundraising). The second group consists of donors who both donated within the period and who had donated prior to that period (Existing Donors). Existing Donors includes people with a first-time gift to one or more specific organization during the period, as long as they also gave to another fundraiser prior to the period. We take these two groups and compare them among three different demographics: Ethnicity, Household Income Range and Age Range. What are the key differences among these two groups?

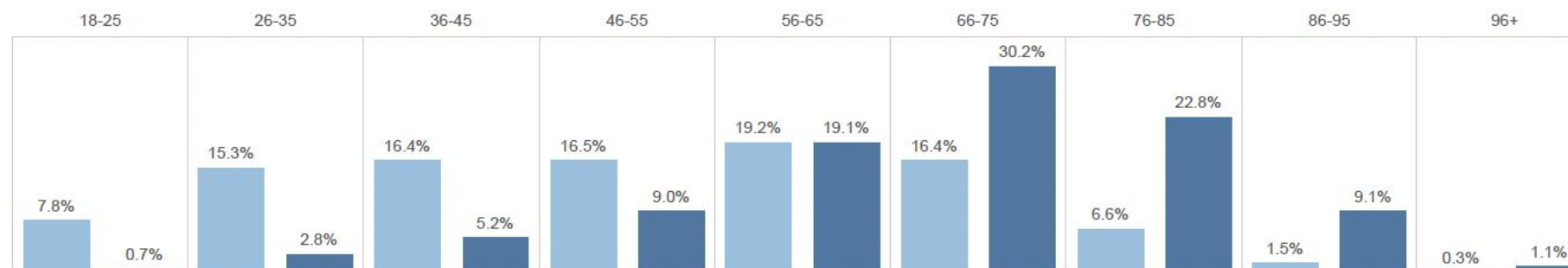
Ethnicity



Household Income

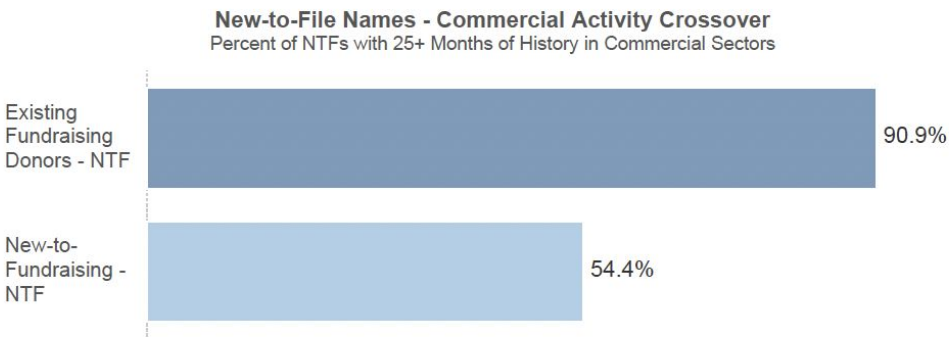
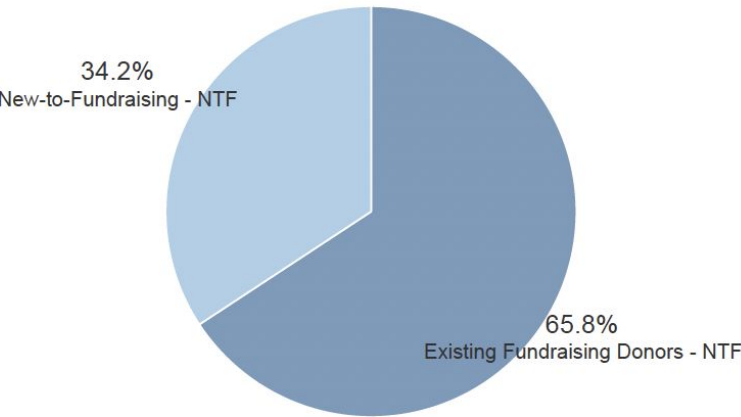


Age Range



New Donors

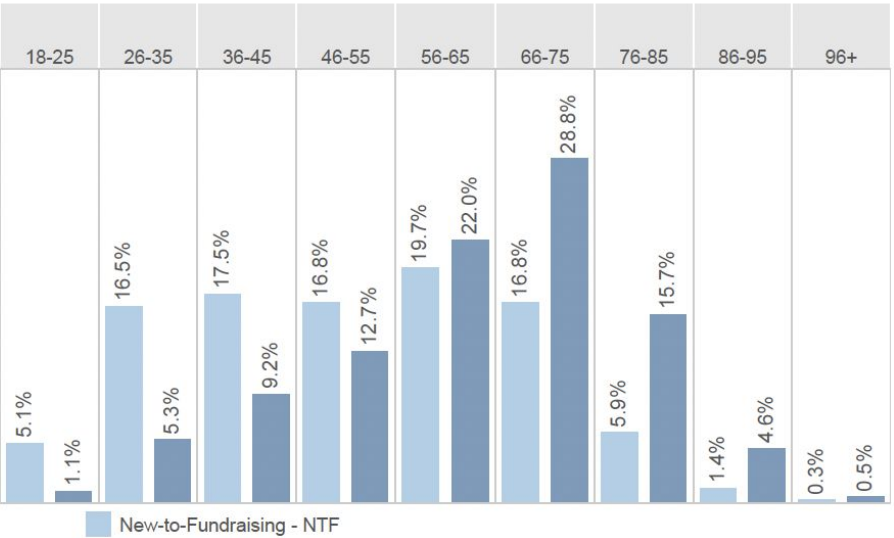
As shown in the pie chart, NTFs consist of two groups: those new to the fundraising sector (New-to-Fundraising NTFs) and those who gave to another fundraiser prior to first giving to your organization (Existing Donor NTFs). It helps answer if you are tapping into a new audience of fundraising donors? Or, are you just getting new donors from the same known pool of existing fundraising donors? The bar graph shows, for the two NTF groups, the presence of recent commercial activity in other industry verticals. The report also provides a demographic profile of each NTF group based on household income and age range to help you understand key differences.



NTFs by Household Income Range



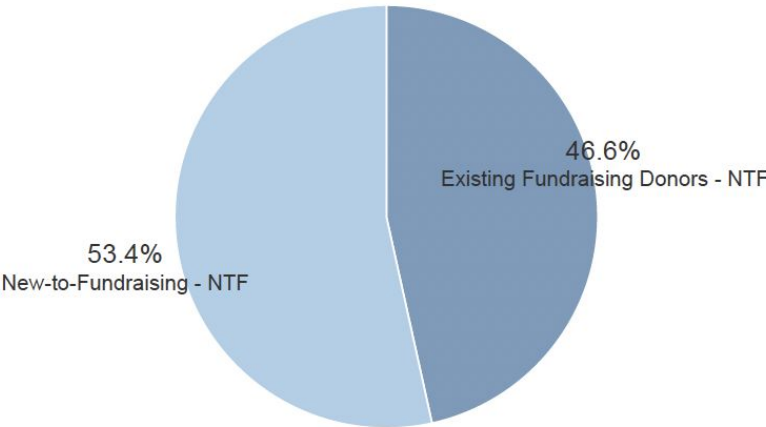
NTFs by Age Range



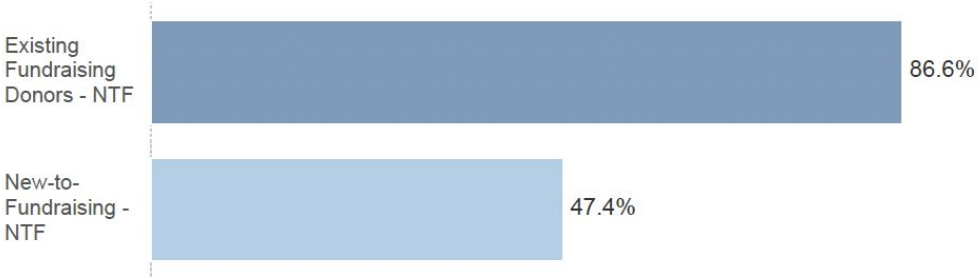
Reports reflect consumer data supplied to Wiland by client. Consumer records identified by Wiland as duplicates are consolidated. All monetary values use gross revenue. CONFIDENTIAL & PROPRIETARY.

New Donors

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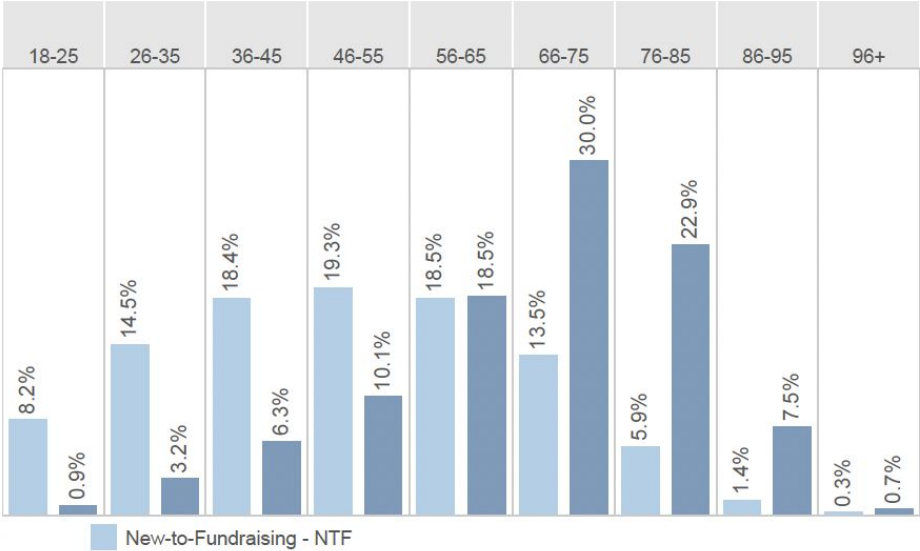
New-to-File Names - Commercial Activity Crossover
Percent of NTFs with 25+ Months of History in Commercial Sectors



NTFs by Household Income Range



NTFs by Age Range



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Constituent Experience

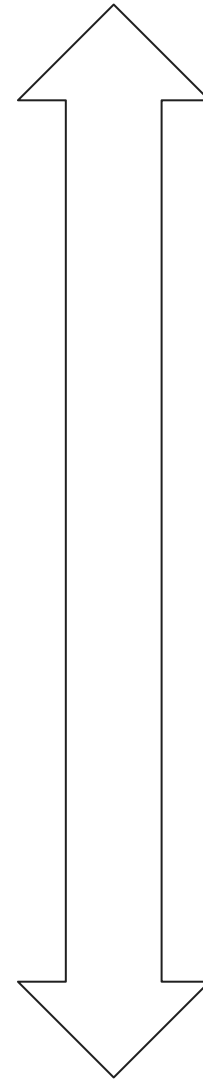
When there's that balance between functionality and emotion, the two amplify each other and the result is very powerful.

~ Mike Matas

- Human-centric strategy
- Constituent context
- Strategic segmentation
- Pertinent, personal and timely touchpoints
- Frictionless journey
- Feedback loops

Connection

We never see anything isolated, but everything in connection with something else which is before it, beside it, under it and over it. ~ Johann Wolfgang von Goethe



Goals and strategies

People and partners

Data, information flows, and tracking

Programs, budgets and processes

Analysis and reporting

Technology and platforms

Q&A

Thank You

BREAK



Reggie Rivers

CEO

The Gala Team



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Gillian Green

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Pursuant



TRANSFORMING Mid & Major Gifts

Gillian Green | JDRF
Stephen Asare | Moody Bible Institute
Kristin Priest | Pursuant



What We'll Discuss

Industry Trends

Creating Community

To ask or not to ask...

Measuring Impact

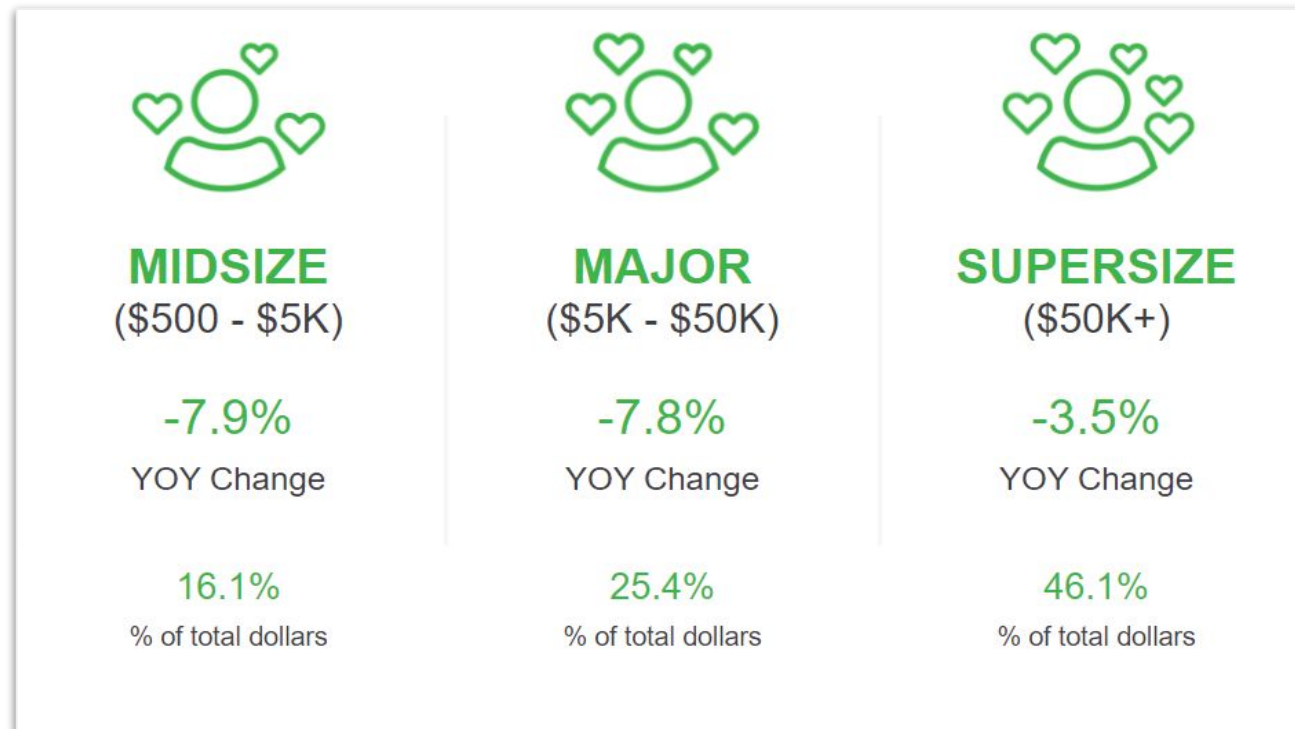
2020 Key Takeaways



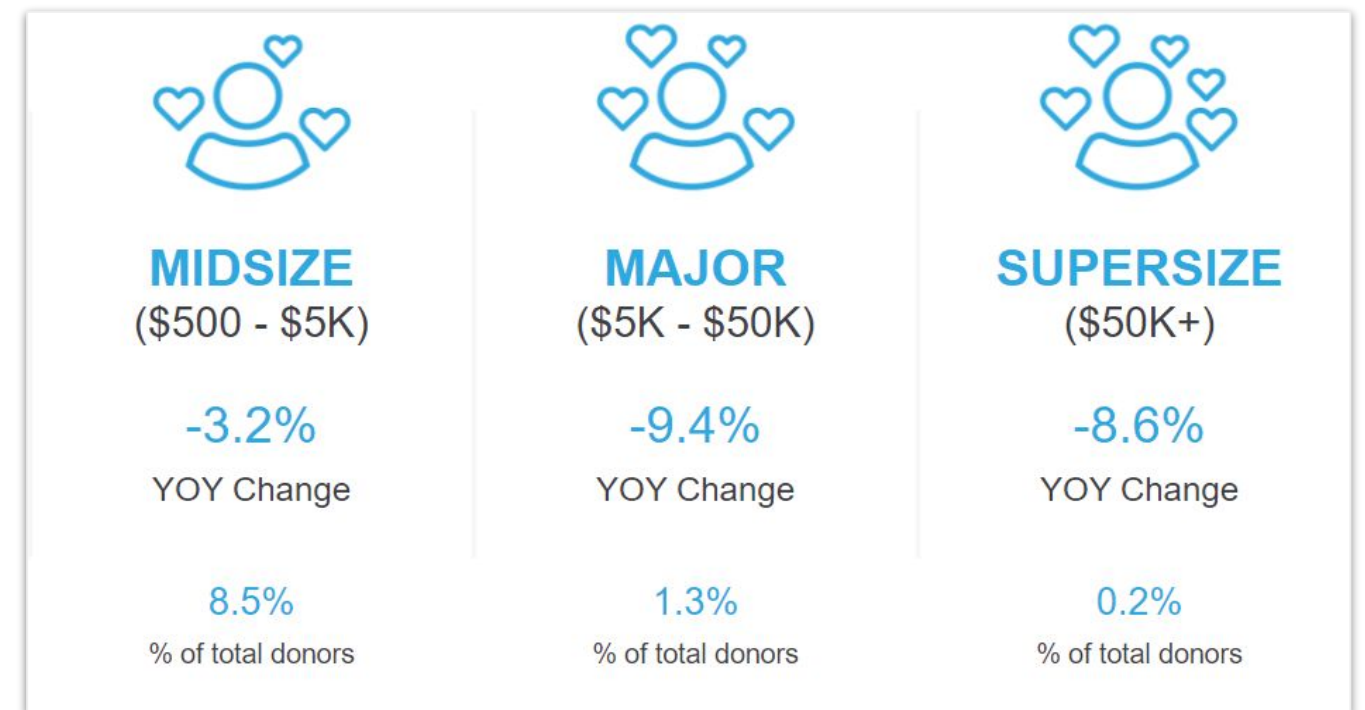
WHAT ARE MID & MAJOR GIFTS

2021 Trends

After unprecedented giving in 2020, Mid and Major donors are showing a decline in giving in early 2021.



DONATIONS



DONORS

TRENDS IN MID & MAJOR GIFTS



**Re-emergence of
“Mega Donors”**



**Spike in DAF &
Planned Giving**



**Shorter cultivation
period**

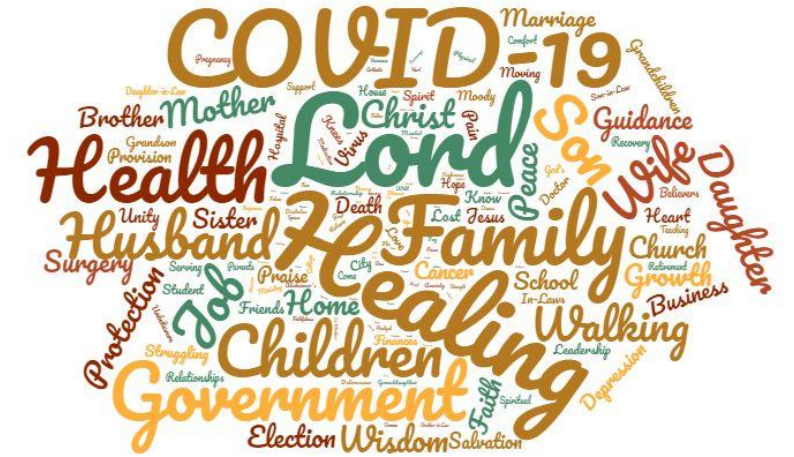


**Increase in broadly
or unrestricted gifts**

A large grid of diverse people's faces, representing a community. The grid is composed of many small, square portraits of individuals of various ages, ethnicities, and genders, all smiling or looking positively at the camera. The portraits are arranged in a dense, overlapping pattern that fills the entire background.

CREATING COMMUNITY

Creating Community



Double down on current efforts

- Phone calls
- Notecards

Expand digital experiences

- Zoom small group worship
- Free virtual concerts

CREATING COMMUNITY

Subcommunities for intimate cultivation



**TO ASK
OR NOT TO ASK...**



Asking in a pandemic

- Communication is key
- Lean into the relationship
- Articulate the **unique** need
- Ask for help & show impact

DONOR COMMUNICATIONS



The background features a light gray textured surface. A vertical line, composed of a thin light blue segment on the left and a wider light gray segment on the right, runs through the center. Several horizontal arrows are present: a light gray arrow pointing right in the upper left, a white arrow pointing right in the middle right, and two light gray arrows pointing left in the lower left.

MEASURING SUCCESS

Measuring Success

EMPHASIS ON ENGAGEMENT

Attempt KPIs

- 15 attempts per day
- 75 attempts a week
- 300 attempts a month

**GOAL: engage with each
Mid-Level donor by June 30, 2021.**

Measuring Success

RESULTS

METRIC	GOAL	RESULTS
Engagement	70%	89%
Lapse Donors	5%	4%
Phone conversations	11,000	11,096
Increase unrestricted revenue	15%	20.9%
Major Gift prospects identified	120	115



2020 & THE DIGITAL TRANSFORMATION

Digital Transformation

- Not everyone excels in the digital environment
- Showing up to show relevance
- Relationship with digital varies by donor segment
- Leverage digital's ability to create togetherness

LOOKING AHEAD

Looking back, what were your biggest challenges, what are you most proud of, and what are you carrying forward?

2021
2020

**Thank
You**