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Donor-Centric Fundraising

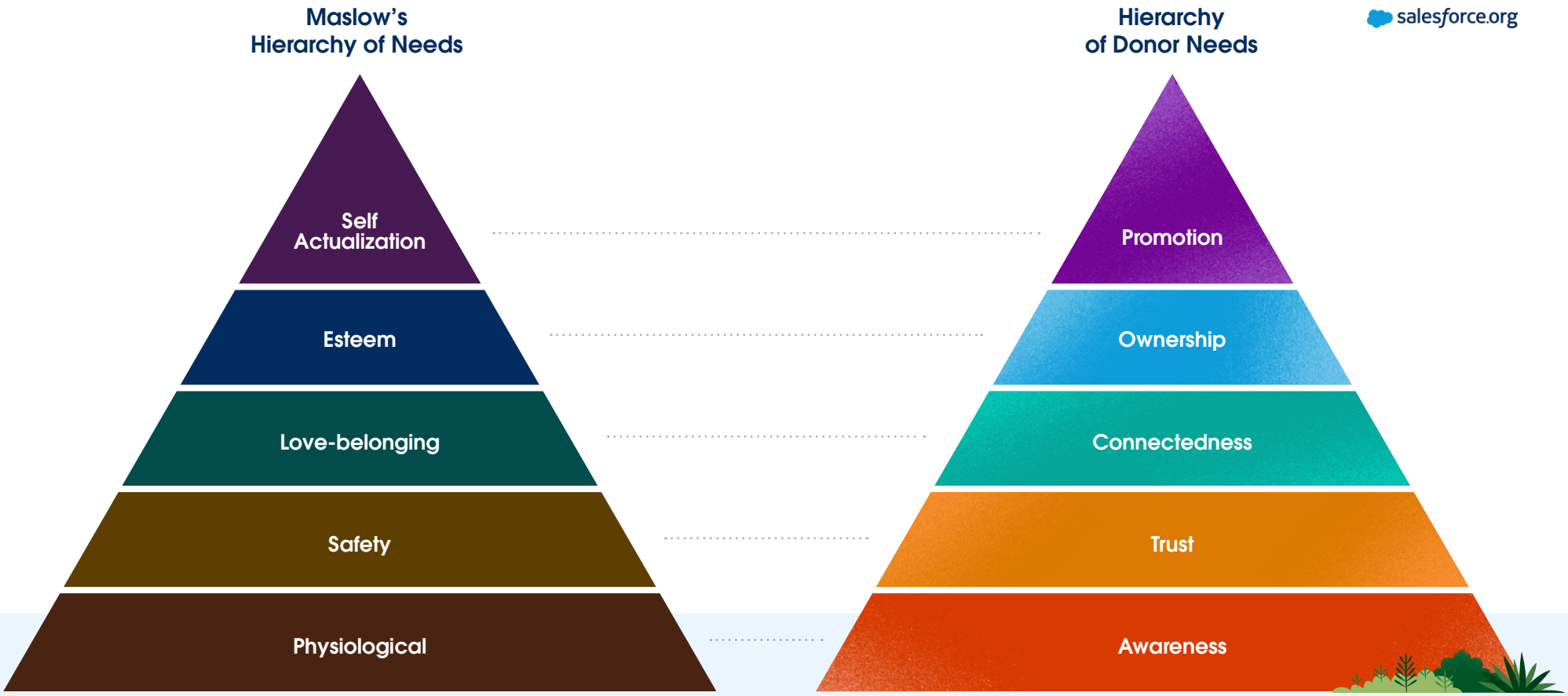
A guide to meeting donor needs and expectations

Power Has Been Shifting From Brands and Organizations to Their Consumers

As nonprofits we are mission focused and we should be! We rely on donors of all kinds to fund our missions and then we use their donations to fulfill our purpose. We solicit, they give, and then we use their donations to further our mission. That's been the model for a really long time, but the world around us is changing. It's becoming more modern and consumer (read: donor) expectations are changing.

We have a network of shared knowledge, which means we have more options when it comes to where we give. When was the last time you booked a hotel or shopped online without first checking the reviews? More and more, our decisions are based on reviews from previous customers, and our networks, to verify the quality of the experience from a somewhat independent party.

Often reviews are based on either met or unmet expectations. Clean environment, quality service, seamless payment options. Our donors are the same. They're our donors to us, but they're also consumers with expectations and needs and their evaluation of nonprofits isn't different from their evaluation of any other transactional experience. Donors don't just want to be a funding mechanism, they want to be fully integrated with your organization and fully committed to your mission. Giving is personal.



So how do we go about meeting, or better yet, exceeding those needs and expectations? In order to anchor our exploration, we looked at Maslow's Hierarchy of needs with a fundraising and engagement twist. From the most basic, to the most sophisticated, Maslow outlines how human needs are built upon.

We believe the needs of donors follow a similar pattern, from the most basic need of awareness to the more integrated experience of promotion. This chart outlines a hierarchy of needs for your donors and we'll dive deep in to each in the following pages to help you understand how you can begin to meet them.

As you look this over, ask yourself these questions:

Are there needs we're not meeting for our donors?

Do we have the team, the tools and the plan we need to give our donors an incredible experience?

Can we see the connection between meeting our donor needs and furthering our mission?

Contents

Awareness

Awareness of your organization is as important to your fundraising efforts as air and water are to human life! A person cannot even consider donating if they don’t know you exist.

Awareness

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The most basic need for any supporter of your organization is simply to know you exist. Similar to the baseline in Maslow's hierarchy (food, water, sleep), no other interaction can take place if your current and potential donors don't have the most basic information about your organization and their mission. This is the beginning of the acquisition cycle and requires your active pursuit. Acquiring new supporter doesn't always mean new donations upfront. This is simply the beginning of a relationship with someone who will ultimately make a decision about whether they align with your organization or not.

This applies to current donors as well. For example, you could use your data to discern whether a frequent donor might be a good candidate for a recurring gift program and then make them aware of it.

Questions

Do you have an acquisition strategy that outlines your mission?

Do you have campaigns made specifically for reaching new audiences?

Are you targeting "look-a-like" donors in your acquisition strategies?

Do your donors have basic information about what your organization does and how?

Are you keeping your current donors informed on changes in your organization?

Tips to Accomplish Awareness

Make sure your mission is clearly stated and easy to find on your website and any other marketing materials.

Ensure you have a strong on-boarding journey for new donors that explains plainly your organization and your mission.

Know the profile of the individuals that you want to engage. Really look at the data and group by engagement.

Create empowering tools that are worthy of a person's story and data. What are the meaningful tools that can be used to further your mission, especially for new donors?

Awareness and Acquisition in Action

For the past 20 years, Shared Hope International has been working to prevent, restore, and bring justice to vulnerable adults and children who have been victimized by sex trafficking. In 2016, Shared Hope noticed a declining trend in donor support from their typical donor base. Their growth teams knew they needed a solution to re-engage with its supporters, and expand their donor acquisition strategy to include anyone who cared about sex trafficking.

After a deep dive into donor profiles, the organization quickly recognized it needed tools to get to know donors better, strengthen relationships, and segment and communicate with bespoke strategies across channels. But, they needed all of their outreach and appeals fully integrated into a core Constituent Relationship Management (CRM) platform and turned to Nonprofit Cloud.

How It Works
Here's one example of how Shared Hope acquires donors:

1. People provide personal information within a Facebook ad in exchange for downloading a tool.
2. This information flows into campaigns or appeals in their marketing automation, which is Pardot.
3. Their information also flows into Salesforce fields in the Nonprofit Success Pack, their CRM. This data is actually synced both ways to ensure it is always up to date!
4. Pardot listens for all the people added, their data, and adds them to lists automatically to segment and communicate with them.

The result new name acquisition increased 58%. New contacts automatically receive a series of introductory emails describing Shared Hope's work and opportunities to get involved. Supporters who are interested in policy work, for example, receive targeted emails about Shared Hope's work and events around legislative initiatives. And, Shared Hope now has a full supporter's profile, history and activity with the organization.

Learn more about Shared Hope here or check out their latest webinar here.

"To be able to track all of our most important relationships well, **we needed a platform that was as deep as our relationships were.** Salesforce had just what we needed. Scalability. The ability to customize. As well as being able to have compatibility with a lot of other technologies that we wanted to use."

Marissa Gunther, Director Of Growth Strategies
Shared Hope International

Trust

Building trust through consistency of message and transparency makes your donors more comfortable with the idea of giving. It's the same security we look for as individuals in our everyday lives.

Trust

Once a supporter is aware of you, they need to know if they can trust you. This is where transparency comes in. We hear this buzz word a lot, but it is popular because it's true. More often, companies and organizations are letting the public behind the curtain – where they source materials and what the markup is. Trust in a nonprofit is no longer based on legacy or tenure, but on exhibiting trustworthy behaviors and that requires all the elements of trust building we use in our personal lives – consistency, follow-through, accountability.

As an example, if you're sending email from multiple sources to one donor (this happens a lot at federated organizations) and the campaigns are different, even conflicting, the donor loses trust and may think one of the emails is fraudulent. If someone calls in for a refund on a donation made in error, does that refund actually go through or do they have to call back? If a donor unsubscribes from a direct mail program, do they keep getting mail? All of these show a lack of consistency, follow-through and accountability and undermines your efforts to build trust with your donors.

Questions

Are you capturing all the data you can about supporters, and using their interest to build trust?

Are you publishing donation numbers and how you're using them regularly?

Do you respond to requests from your donors in a timely and complete manner?

Tips to Accomplish Trust

Make spending reports readily available and update them often, on your website, with other data.

Keep your data clean and consolidated across all internal teams – development, marketing and digital engagement.

Create a great support and follow-up experience for donors, and have real people tasked to reach out.

Create a consistent "brand" for your programs so donors become familiar with what's genuinely yours.

Trust and Consistency in Action

ADL is a leading anti-hate organization. Founded in 1913 in response to an escalating climate of anti-Semitism and bigotry, its timeless mission is to protect the Jewish people and to secure justice and fair treatment for all. Today, ADL continues to fight all forms of hate with the same vigor and passion. ADL's ultimate goal is a world in which no group or individual suffers from bias, discrimination or hate.

ADL has 25 regional offices supporting the organization's mission with locally focused programs, campaigns, and outreach- all working towards the same mission. Previously, disjointed lists and technology platforms made consistency and coordination in marketing and fundraising a challenge.

"NPSP and Marketing Cloud allow us to keep up with the increasingly sophisticated needs of our donors, allowing us to track their specific interests within the organization and tailor solicitations for maximum impact," remarks Carol Goldstein, Senior Director of Marketing.

How It Works

1. ADL consolidated 478 regional data sources, centralizing a trusted source for their 75,000 constituent records on The Nonprofit Success Pack, with a 360-degree view of each individual.
2. Staff then leverage Marketing Cloud to customize donor communications based on their newfound 360 view of donors' interests or giving levels, including a welcome series journey designed for new donors.
3. End of year activities across all chapters like Giving Tuesday, Regional Giving Days, events, galas and more are all easy to take advantage of with integration to the Appexchange with Classy for online giving and events.
4. With this full history of engagement, development staff can customize outreach and strategies to elevate financial support.

The move has also enabled ADL to provide more cohesive messaging, by designing, distributing and training on email templates that allow regional offices to import custom lists and tools. For example, if regional offices send out local messages, the staff at headquarters can suppress regional distribution lists on their own outgoing emails to avoid duplication of communications.

Learn more about ADL here or check out their latest webinar here.

"Our focus is to provide a great experience for all of our supporters, but also staff, with modern tools they can use to fundraise. With marketing and fundraising working together, we were able to grow our funds raised on **Giving Tuesday in 2018 by 157% year over year**."

Maryanne Nigro, Director of Development Operations
Anti-Defamation League

Connectedness

Connection is what builds bonds that make donors stick around. That sense of belonging we all seek as humans is applied to how deeply we feel connected to your organization.

Promotion

Ownership

Connectedness

Trust

Awareness

Connectedness

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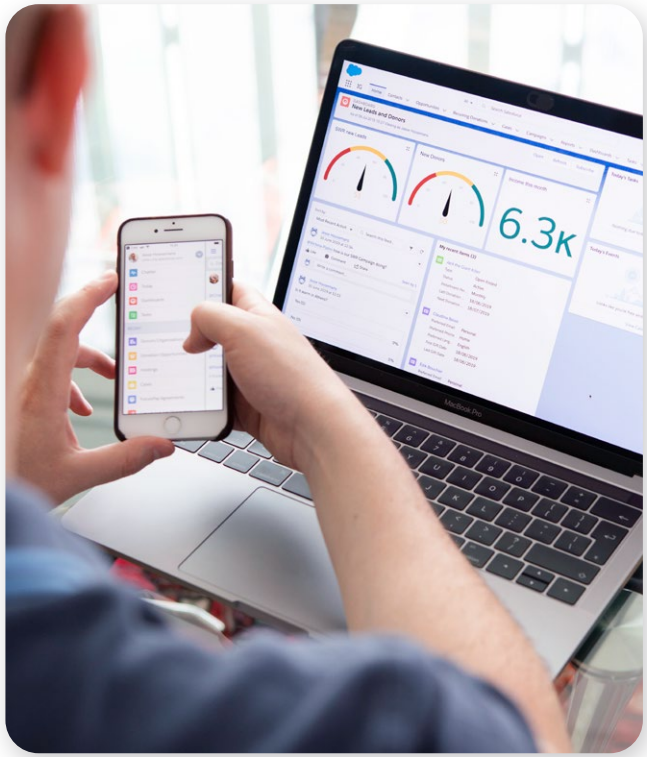
This is the section where most of your donors land. They've heard about you, they know your mission and they believe you're doing the right thing, but they're having a hard time connecting. There's an impasse. This is also a fairly large section. So many of our fundraising behaviors are part of connectedness. One important thing to consider here is that connectedness is a two way street – you being connected to your donors and your donors begin connected to you.

A lot of executing on connectedness is in the how. How you're reaching out and the channels and tools you're using speak to the authenticity of a connection. For example, how easy is it to use your donation pages, sign-up to volunteer, or reach someone who can help answer a question? Is it intuitive or do things feel out of place? Also, consider the platforms you're on. Engaging with donors in a place that feels natural to them (think Instagram vs email) enhances connection.

Personalizing content is always a great way to show your donors your care and that giving is, indeed, personal. It can be as simple as a using their name in an email subject line, or keeping the message a bit less formal and minimizing traditional marketing words. These small yet intentional decisions can help form a bond between donor and organization.



Questions

Do you feel like you're aware of the digital world outside of your organization?

Are you communicating to your donors on their terms?

Is your online donor experience intuitive from the donor's perspective?

Tips to Accomplish Connectedness

Find out which platforms your donors are on (Instagram, Venmo) and see how you can set up content and/or giving opportunities. Try something new!

Personalize emails with donor names, donation amounts and any other personal factor (recurring donor, volunteer, etc.)

Create hand-offs to development teams for follow up actions.

Connectedness and Personalization in Action

UNHCR is dedicated to saving lives, protecting rights, and building a better future for refugees, forcibly displaced communities, and stateless people around the world. It's been a trailblazer for Human Rights since 1950 when it was tasked with looking after the refugee flow to Europe following the Second World War. Today, there are 70.8 million forcibly displaced people worldwide whom UNHCR are helping restart their lives, and its efforts have been rewarded with two Nobel Peace Prizes. The work of UNHCR is just as relevant today as it was nearly 70 years ago – there are more than 16,000 people working tirelessly in 134 countries around the world.

With revenue coming from multiple sources, UNHCR needs to build closer relationships with private donors and track how money is being spent. UNHCR has used Salesforce since 2014 to help manage the private donor lifecycle – from lead generation to ongoing, personalized communications. It also uses the platform to process one-off and recurring payments in multiple currencies.

Unlike many nonprofits, fundraising is very much a global affair for UNHCR, which means it needs to ensure colleagues from fundraising offices around the world remain connected. It recognizes that maintaining remote relationships can be hard, so it brings teams together at its annual global skillshare to discuss ideas, share knowledge and strengthen relationships.

How It Works

1. Departments came together to visualize their current supporter experience and map each of their personas (think post-it notes on a wall with each touch-point).
2. Develop personas and segmented them based on data in the Nonprofits Success Pack (think donors, fund-raisers, volunteers).
3. Define key moments in each persona's journey and create personalized messages inside of Marketing Cloud, remembering to solve for pain points as needed.
4. Build and automate journeys for each of these personas, but also trigger communications based on special moments in a donor's tenure or special occasions like their birthday.

By empowering its fundraising teams to work faster and smarter, UNHCR will be able to achieve its $1 billion target and maximise the impact of its relief efforts. In a world where nearly one person is forcibly displaced every two seconds due to conflict or persecution – meeting this fundraising target is more urgent than ever.

Learn more about UNHCR here.

"With Salesforce, we can capture donor data centrally, which boosts our fundraising efforts and **enables us to take a more personalized approach.**"

Jesse Hoosemans, CRM Technical Lead
UNHCR

Ownership

In this stage, a donor begins to personally identify with your organization, your community, and your impact.

Promotion

Ownership

Connectedness

Trust

Awareness

Ownership

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Connectedness, if done correctly, evolves into to ownership. The donor begins to feel like the work of the organization is part of who they are and an extension of their own efforts. Impact is huge in this area. Is what I'm doing working? Are our combined efforts helping the cause? A donor may choose to begin a recurring donation when they begin to feel an ownership of the efforts of your organization.

This is the time when your organization is encouraged to show more transparency than in previous stages. Don't be afraid to showcase a lesson learned through a tactic that didn't pan out as planned. Donors in the ownership phase are not scared away by real numbers or even weakness because they function as extensions of your staff or board.

This is also the phase when it is common to air a bit of dirty laundry. Or have a frank conversation about overhead cost. In short, it's time to talk TP. Toilet paper. The cost of toilet paper.

Questions

Are you acknowledging the commitment of donors when they give?

Do they feel like they're communicating directly with your organization?

Do you send regular impact reports in an individual and corporate scale?

Tips to Accomplish Ownership

Follow up with donors on where their money went and what specific impact it had.

Send special acknowledgments to your donors when they make significant donations.

Create badges, loyalty, and membership programs.

Ownership and Transparency in Action

buildOn's mission is to break the cycle of poverty, illiteracy and low expectations, through service and education. The Connecticut-based nonprofit empowers urban youth in the most under-resourced schools in America, to transform their own neighborhoods through intensive community service. It also works in low income countries, to engage volunteers and locals in transforming communities through building schools.

buildOn wanted to reach high schools and colleges over the US and globally, to have those students engage with their wide networks of potential donors, to convert those donors into long-term supporters, and to give teams real-time fundraising results. In addition, it wanted to be able to facilitate the logistics of trips and monitor program impact.

In 2014, to scale its global programs, buildOn migrated its donor management and fundraising into the Nonprofit Success Pack. Concurrently, it integrated Classy, a connected application, to support its school construction peer to peer fundraising process, and Form Assembly, to track these global programs. In 2018, buildOn was able to augment its technology with new functionality offered in Lightning.

How It Works

1. Follow up with donors on where their money went and what specific impact it had.
2. Send special acknowledgments to your donors when they might significant donations.
3. Create badges, loyalty, and membership programs.

Since 2014, the organization has raised $13.2 million and managed 55,000 unique donors via Classy. Total giving has increased by 75 percent, individual donors by 22% and total gifts by 25%. And because of the integration with program data, buildOn now has robust data on its outcomes. It can show that 1,351 schools have been built to date – powered by 2.2 million volunteer work days from local community members – such that 177,510 additional students now attend school every day.

Learn more about buildOn here or watch their latest webinar here.

Promotion

This is the ultimate. Actualization. The dream has become a reality. In this stage, donors are advocating for your organization, putting their time, name, and resources towards fulfilling a mission that's meaning to them.

Promotion

Ownership

Connectedness

Trust

Awareness

Promotion

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At this point, your donor is completely committed to your organization! So much so, that they're lending their time, their name, their network and their reputation to further your (now shared) mission. These folks are considering major gifts and even board service. Think of them as organizational hype team. Your organization's brand has become a central part of their personal brand.

Donors at the promotion level are expecting one-on-one attention, phone calls from executive directors and board chairs, handwritten notes and a fully personalized experience. They are likely interested in what's happening at the awareness and trust levels, too, but that's because their friends have just entered your relationship building cycle and they want ensure a positive experience

Questions

Do you have a plan for how to identify donors who may want to make a major gift or engage in your board?

What opportunities do you have for major donors to support your organization in a big way?

How are you creating a culture of philanthropy and including extended teams in stewardship?

Tips to Accomplish Promotion

List potential major gift opportunities, and where they come from.

Gather as much information about who they are and what they care about.

Allow your advocates to influence your organization both internally and externally.

Create a process for finding, cultivating, and stewarding them collaboratively.

Promotions and Major Gift Planning in Action

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The Great Ormond Street Hospital Charity inspires supporters all over the world to raise around £100 million annually worth of funds. The charity supports the pioneering work of the London-based hospital, which cares for more than 300,000 children every year. 35% of the charity's annual income comes from major giving, which comes in many forms including individual, legacy giving, and grants.

The charity transferred more than 100 million historic records to Salesforce, which it can now interrogate to drive greater business intelligence. "Although the supporter information we capture hasn't changed, we can now access and analyse so much more easily," said Ian Chivers, the charity's Director of Finance and Operations.

For example, the team can compile a holistic view of all supporters across all fundraising streams, which helps improve stewardship. In the past, it took five hours to pull together information on major donor fundraising. With Salesforce, this static monthly report has been transformed into a 24x7 dashboard in once click.

"With Salesforce, we can raise more money at a lower cost, which means we can give more help to the children, families, and staff of Great Ormond Street Hospital. For the first time, I have a single view of the truth about how much money is being raised and where it is coming from. This means I can make decisions based on trusted data and ensure we are on track to hit our fundraising targets."

How It Works

1. Gain one aggregated view of a potential or existing donor including giving history, demographics, and wealth.
2. Create reports and lists on those with the highest potential to give are accessed real time by all major giving teams.
3. Automate and track communications by major gift teams, and personalize at scale with marketing automation (Marketing Cloud).
4. Make all of this data is available real time on any device, for development teams on the go.
5. Solicitations are tracked and many times are allocated against programs.

Donations can be recorded against specific items of charitable expenditure, such as children's play equipment or medical research initiatives, based on their personal preferences. This integration has cut administration by 50% and will enable the charity to keep supporters updated on how their donations have helped the hospital and sick children.

Learn more about Great Ormond Street Hospital here.

Exceeding Donor Expectations

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Maslow's Hierarchy of Human Needs is just one way of analyzing your donor's needs and expectations. Our donors are individuals who want to build meaningful connections with organizations and their missions.

Try this worksheet to begin to evaluate if and how you're meeting donor needs and start to ideate ways to build incredible experiences into your relationships with your donors.

Who are our donors, and what are their personas?

What needs are you meeting well?

What's something you can change TODAY that will help you meet the needs of more donors?

How can you craft the best experience around your donor's expectations?