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Making the Most of

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Founder & CEO

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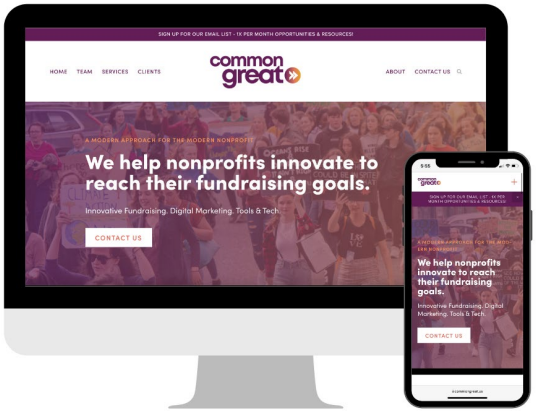

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Founder & CEO, common great

Forward-looking Fundraising Strategy, Campaigns & Tech

- Strategy & Creative Retainers
- Assessments & Planning
- Digital Marketing Strategy
- Omnichannel Campaigns
- Capital & Significant Campaigns
- Fractional / Flexible / Interim Talent
- Development Talent Search
- CRM Selection & Transition
- Giving Platform Selection & Transition

Land Acknowledgement & Resisting Indigenous Erasure

I am teaching today on the homelands of the tribes of the Coast Salish and Duwamish people. Our community has been enriched by their past and present stewardship of these lands and their contributions to our history, culture, and economy. I respect and honor these people and their sovereign tribal nations. I encourage you to examine how you can take action to fight the erasure of indigenous people and histories, and I invite you to join me in a monthly donation to Real Rent Duwamish. I donate $1 per month for every year that I have lived on their land, now at $15/mo.

Our agenda!

1. Maximize platform features
2. Smart Segmentation
3. Leverage a Match
4. Invest in Champions
5. Rock your Stewardship
6. Evaluate Success
7. Q&A

1)Maximize platform features

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2) Smart Appeal Segmentation

Who is your audience? ~~Everyone!~~ Nope. Prioritize!

Patterns in your Give Local donors
Volunteers, board / past board, subscribers, program alumni, affinity groups…

Priority groups
Top-dollar, most-loyal, monthly, and/or new donors… and their networks!

Segmented messaging
Different stories and personalization

3) Leverage a match

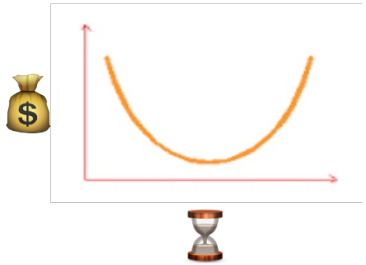
Matches increase:

- Likelihood of giving
- Donor conversion (% of page visitors who give)
- Gift size
- Dollars raised
- Donor acquisition

Multiple matches create multiple urgency levers at different points in the campaign!

How to utilize matches

Campaigns are “U-Shaped”
No matter the campaign length, size of goal, etc!



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Why care?
It impacts your match strategy!

Match Timing

Given the U-shape of campaigns and the goal proximity effect, you could deploy your match:

- At the start of early giving on Oct 31 (to start the active campaign period with less distance to goal)
- At the official start on Nov 7 (if you're not focusing a lot on early giving OR if you want to ride the bigger attention wave of the official active campaign days)
- On Nov 13 or 14 (halfway through the official campaign, to intervene in the pattern of the U-shape)

Micro-goals are great but don't get too granular with micro-matches like "in the next hour only" - people may not even see your email or post until after that.

Sourcing your match

- Past match donors – often board or volunteer
- Big past Give Local donors to you – leverage what they love
- A pool of matching gift donors vs one donor - more equitable
- Corporations or local businesses - great PR for them

4) Invest in Champions

- Cut through the noise from other organizations 🔪
- Provide a concrete tool for your advocates 🛠
- Multi-generational appeal 👩‍👧‍👧
- Acquisition success (25-30%) 🤰
- Cultivation for existing donors & vols 🌱

Who are your Champions?

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Managing Champions to Success

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Peer leadership helps
Find a board member or volunteer who can enthusiastically model the behavior and help bring others on board

Guide them on goal-setting 🎯
This stuff makes people nervous. Offer a default goal and advice on why that P2P fundraiser might want to lower or increase their goal.

Incentivize, gamify, and recognize your Champions
Who raised the most, Who had the most donors*, fastest to goal, etc

Activate Champions during early giving 🚀
Early investment pays off in increased middle momentum and this gives them more runway to fundraise

5) Rock Your Stewardship

Making a Stewardship Plan

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Instant Stewardship

Gratitude has a 24-hour half-life
Every day you wait, the emotional impact of the thanks is halved

The data doesn't lie
TY within 48 hours = 4x more likely to make second gift

The challenge
Can you commit to a 10minute email thank-you window? ⏰

Team
You'll probably need one :) Find a buddy and ensure they have permission to spend their workday helping.

Example Stewardship Matrix

Segment:->	New Donors	Loyal Donors	Major Donors	Champions
Instant TY	x	x	x	
Call/Email from ED			x	
Call/Email from DD	x	x		
Call from board				x
Handwritten TY	x	x		
Program Tour Invite	x		x	
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Summer BBQ Invite	x	x	x	x

Stewardship Ideas

Use unique aspects of your mission to stand out!

- Arts? Meet an artist/director/rehearsal invite
- Animals? Puppy playdate
- Possibly offer a volunteer opportunity

Stand out with effort

- Handwritten TYs (pre-prep for ease!)
- Something experiential (bow)

Use personalized video

- Send personal TY video to specific segments

Engage your board

- Virtual Thank-A-Thon
- Handwritten TYs

5) Evaluating Success

General

- YOY growth in # of donors and $ raised
- # and % for new, lapsed, and renewed donors
- Donor pyramid spread of gift amounts (--> major donor dependency)
- Appeal engagement data - opens, clicks, gifts for emails and reach statistics for social posts; time of day, type of post, etc (Link shortener!)

Champion-related

- # Champions & YOY growth
- $ raised by Champions & YOY growth
- % of $ raised through Champions & YOY growth
- # new donors / # returning via Champions

Q & A