

# FUNDRAISING CLIMATE CHANGE AND WHAT YOU CAN DO ABOUT IT

How to survive and thrive during the most turbulent yet transformative era ever to face fundraisers.



Your presenter



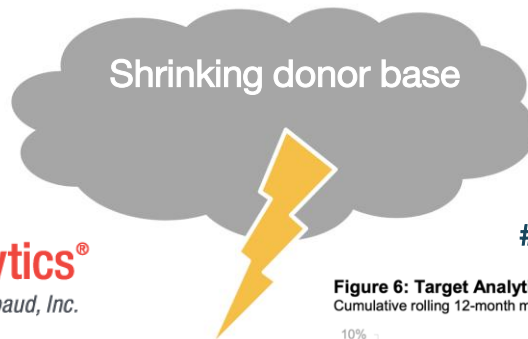
**Greg Warner**

Author, Engagement Fundraising  
CEO & Founder

market  smart

# AGENDA





**Target Analytics®**  
a division of Blackbaud, Inc.

2005 to 2015  
– 25.1%  
– 2.8%/year

**AFP** ⇒ FUNDRAISING  
EFFECTIVENESS  
project  
2017 to 2018  
– 4.5%

# of people giving to charity declining ↓

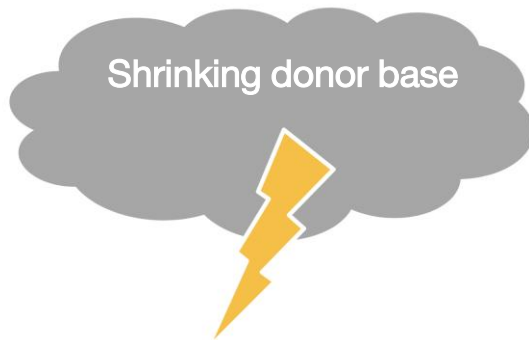
**Figure 6: Target Analytics donorCentrics Index Donor and Revenue Trends (2005-2015)**  
Cumulative rolling 12-month median change from Q4 2005



Source: Cumulative Rolling 12-Month Median Donor Change from Q4 2005, Target Analytics donorCentrics Index of Direct Marketing Performance, 2015 Fourth Calendar Quarter Results, April 2016.

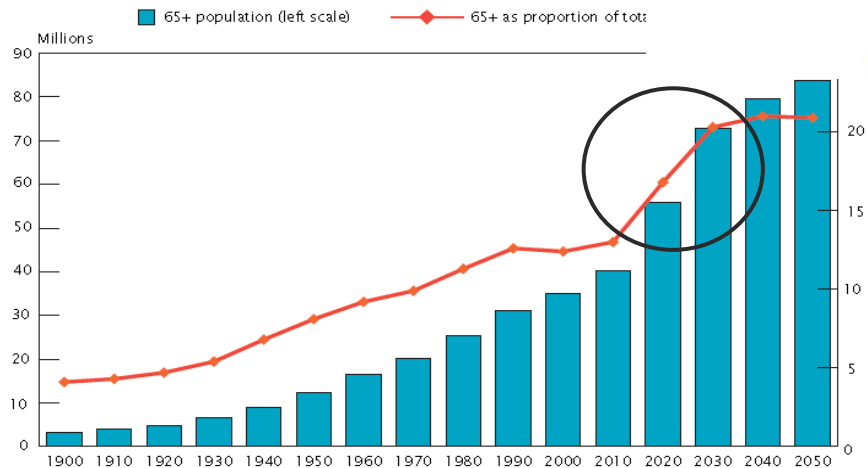
<https://ips-dc.org/wp-content/uploads/2016/11/Gilded-Giving-Final.pdf.pdf>

+65 population increasing too



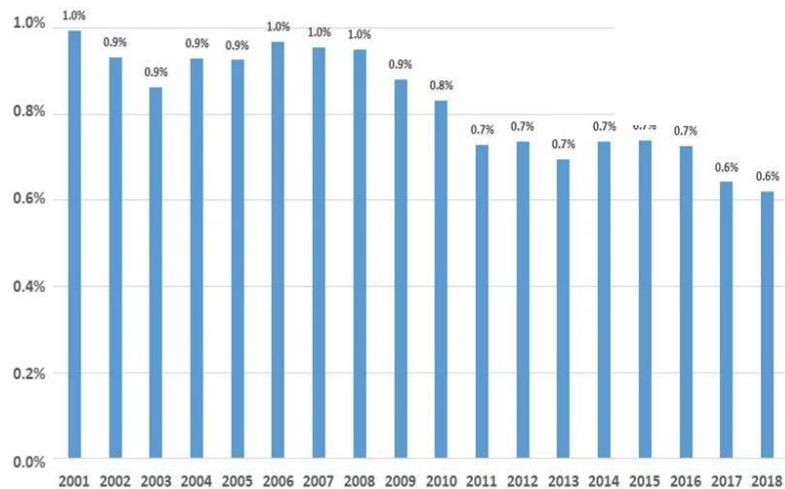
### Population Aged 65 and Over: 1900 to 2050

(For information on confidentiality protection, nonsampling error, and definitions, see [www.census.gov/prod/cen2010/doc/sf1.pdf](http://www.census.gov/prod/cen2010/doc/sf1.pdf))



Sources: 1900 to 1940, and 1960 to 1980, U.S. Bureau of the Census, 1983; 1950, U.S. Bureau of the Census, 1953; 1990, U.S. Bureau of the Census, 1992; 2000, U.S. Census Bureau, 2001; 2010, U.S. Census Bureau, 2011; 2020 to 2050, U.S. Census Bureau, 2012a; 1900 to 2010, decennial census; 2020 to 2050, 2012 National Population Projections, Middle series.

Population increasing  
+.6 to 1% per year



<http://eyeonhousing.org/2019/01/u-s-population-growth-persists-but-growth-rate-slows/>

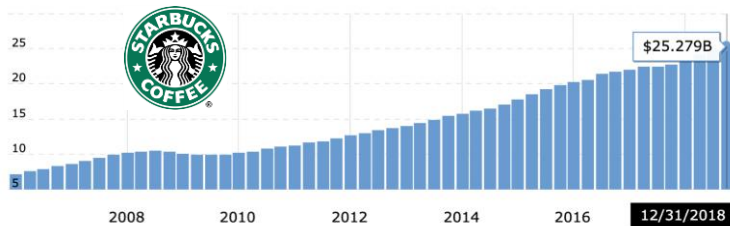
Shrinking donor base



Economy WAS on-track

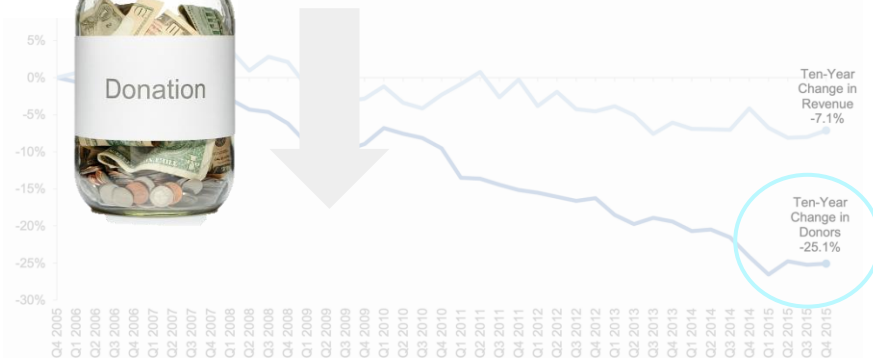


Historically low  
unemployment



f people giving to charity declining

donorCentrics Index Donor and Revenue Trends (2005-2015)  
n change from Q4 2005



Source: Cumulative Rolling 12-Month Median Donor Change from Q4 2005, Target Analytics donorCentrics Index of Direct Marketing Performance, 2015 Fourth Calendar Quarter Results, April 2016.

<https://ips-dc.org/wp-content/uploads/2016/11/Gilded-Giving-Final.pdf>

Shrinking donor base



## ANOMALY ALERT By the end of Q2 2020



**Donors**

(Year-to-date) 56%

↑ **+7.2%**  
YTD Change



**Donations**

(Year-to-date) 47.3%

↑ **+7.5%**  
YTD Change



**New  
Donors  
(YTD) 51.9%**

↑ **+12.6%**  
YTD Change

# WHY?

Shrinking donor base

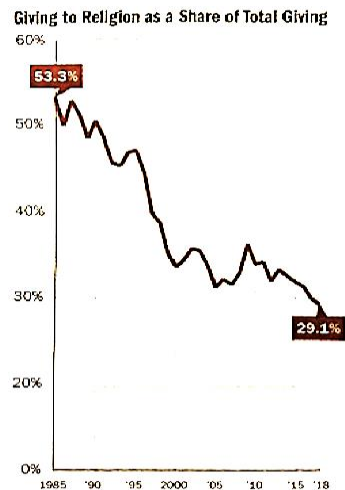
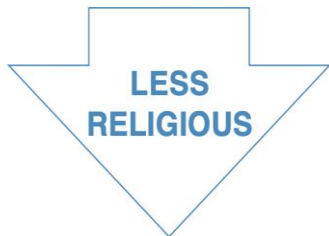


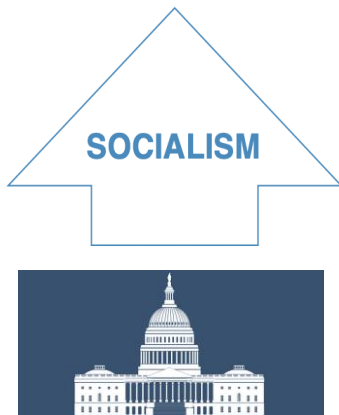




The Connected To Give Report Series  
A National Study of American Religious Giving  
<http://jumpstartlabs.org/offering/research-reports/connected-to-give/>

“The more important **religion** is to a person, the more likely that person is to **give** to a charity of any kind.”





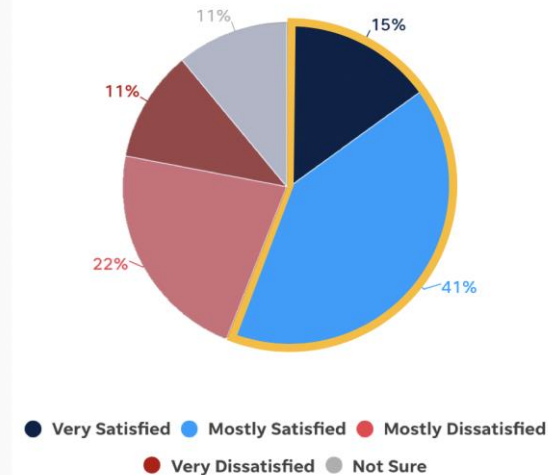
**56% of likely  
Democratic  
caucusgoers**

**"Would be satisfied with  
a nominee who thinks  
the U.S. should be  
more socialist."**

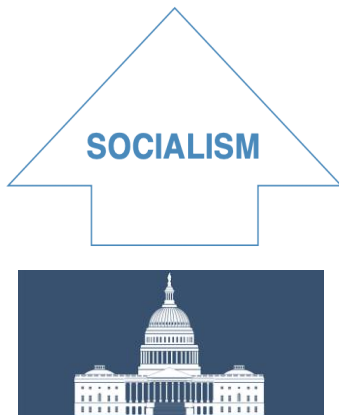
March 3 - 6, 2019

<https://www.desmoinesregister.com/story/news/politics/iowa-poll/2019/03/10/election-2020-joe-biden-bernie-sanders-harris-warren-democrats-iowa-caucuses-poll-president-caucus/3098982002/>

Iowa likely Democratic caucusgoers were asked: "Would you be very satisfied, mostly satisfied, mostly dissatisfied or very dissatisfied if the Democratic Party nominated someone who thinks the country should be more socialist?"

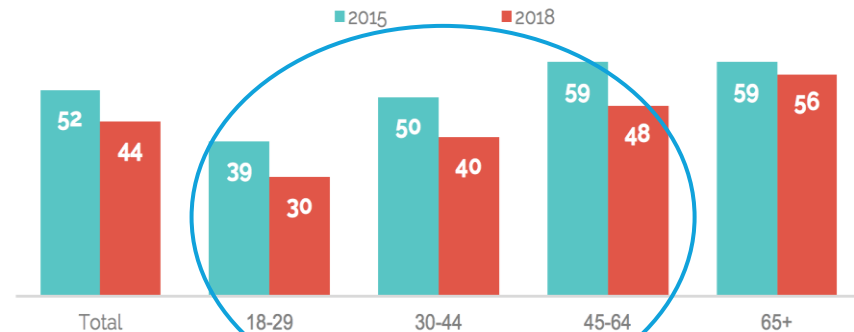


SOURCE Iowa Poll of 401 likely Democratic caucusgoers, Mar. 3-6. Margin of error: plus or minus 4.9 percentage points.



### Favorability of capitalism has fallen across all age groups since 2015

% of US adults who have a "very favorable" or "somewhat favorable" opinion of capitalism



YouGov | yougov.com

<https://today.yougov.com/topics/politics/articles-reports/2018/08/07/socialism-capitalism-popular-baby-boomers>

May 1, 2015 - Aug. 2, 2018

Do you **trust charities**  
today **more**, **less** or  
**the same** as you did  
5 years ago?

"Only 10% were  
optimistic in their trust  
improving over time."

Shrinking donor base



The Council of Better  
Business Bureaus and the  
Better Giving Alliance

<https://www.give.org/donortrust>



**-9%** drop in trust in 2018 in the USA

**-18%** drop among 'informed public' in the USA



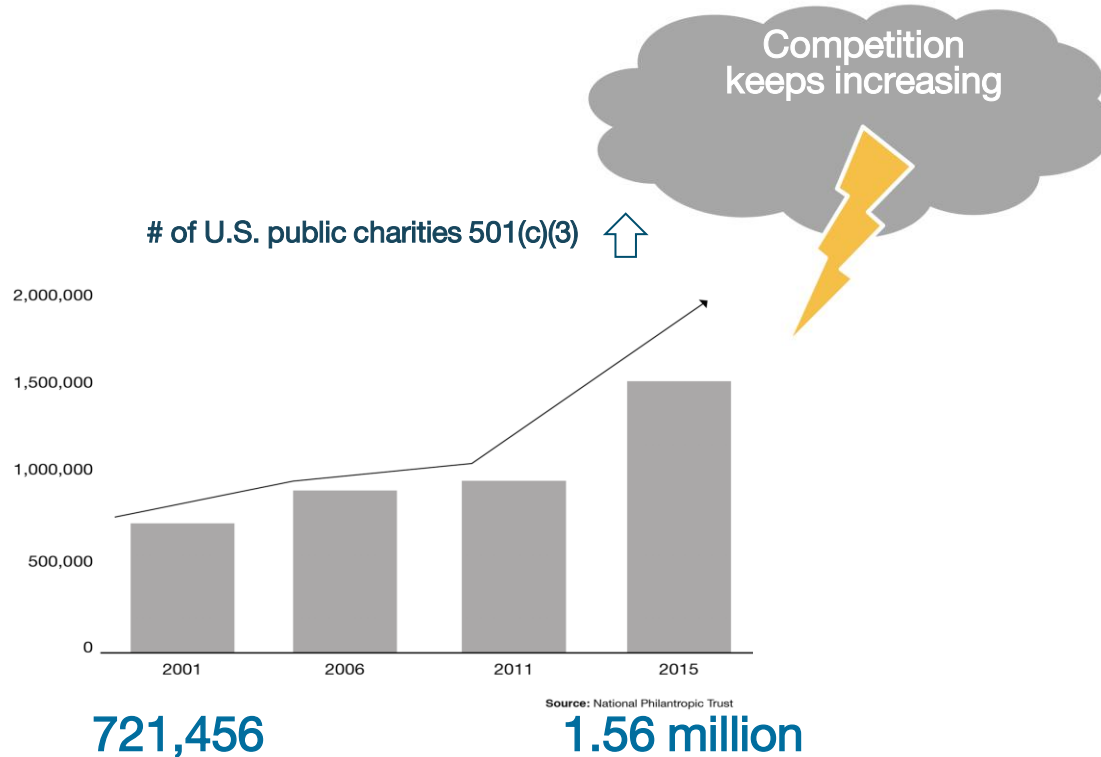
**Informed Public: Trust in Business has Surpassed Trust in NGOs**

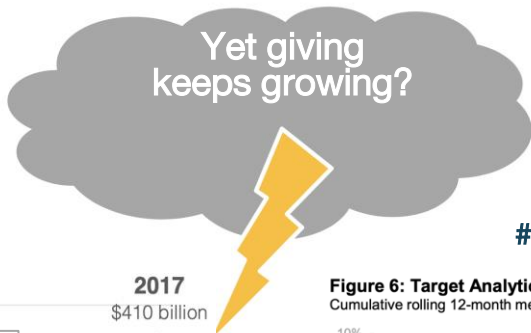
Percent trust, informed public age 35-64, 16-market average, and change from 2007-2020

**Key**

- Business
- NGOs







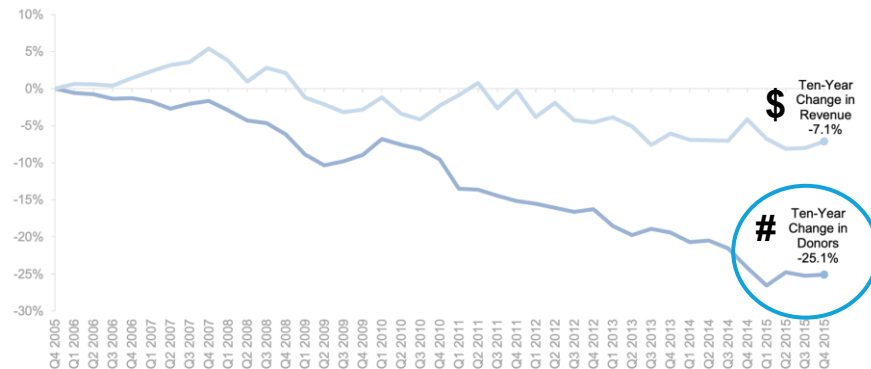
\$ given to charity rising ↑

# of people giving to charity declining ↓



Chart: The Conversation, CC-BY-ND • Source: Giving USA Foundation/Indiana University Lilly Family School of Philanthropy •

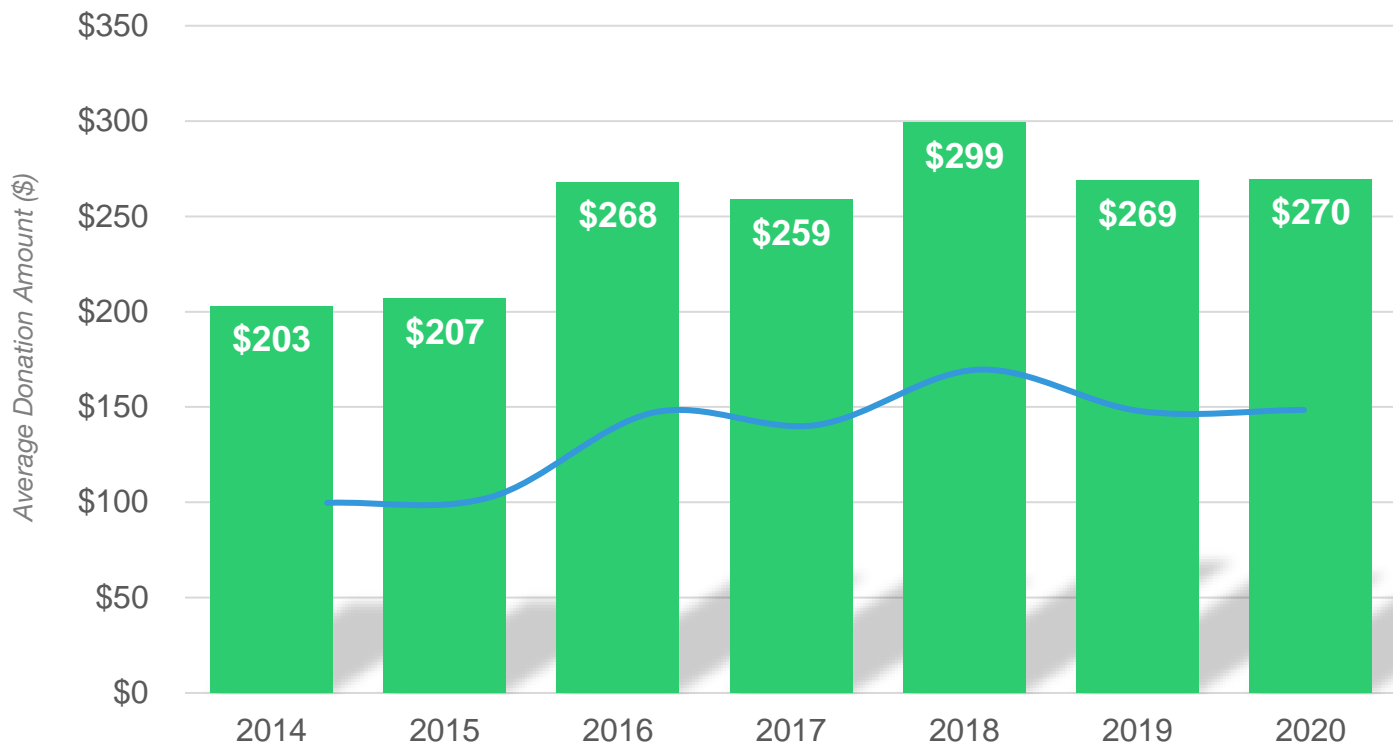
**Figure 6: Target Analytics donorCentrics Index Donor and Revenue Trends (2005-2015)**  
Cumulative rolling 12-month median change from Q4 2005



Source: Cumulative Rolling 12-Month Median Donor Change from Q4 2005, Target Analytics donorCentrics Index of Direct Marketing Performance, 2015 Fourth Calendar Quarter Results, April 2016.

<https://ips-dc.org/wp-content/uploads/2016/11/Gilded-Giving-Final.pdf.pdf>

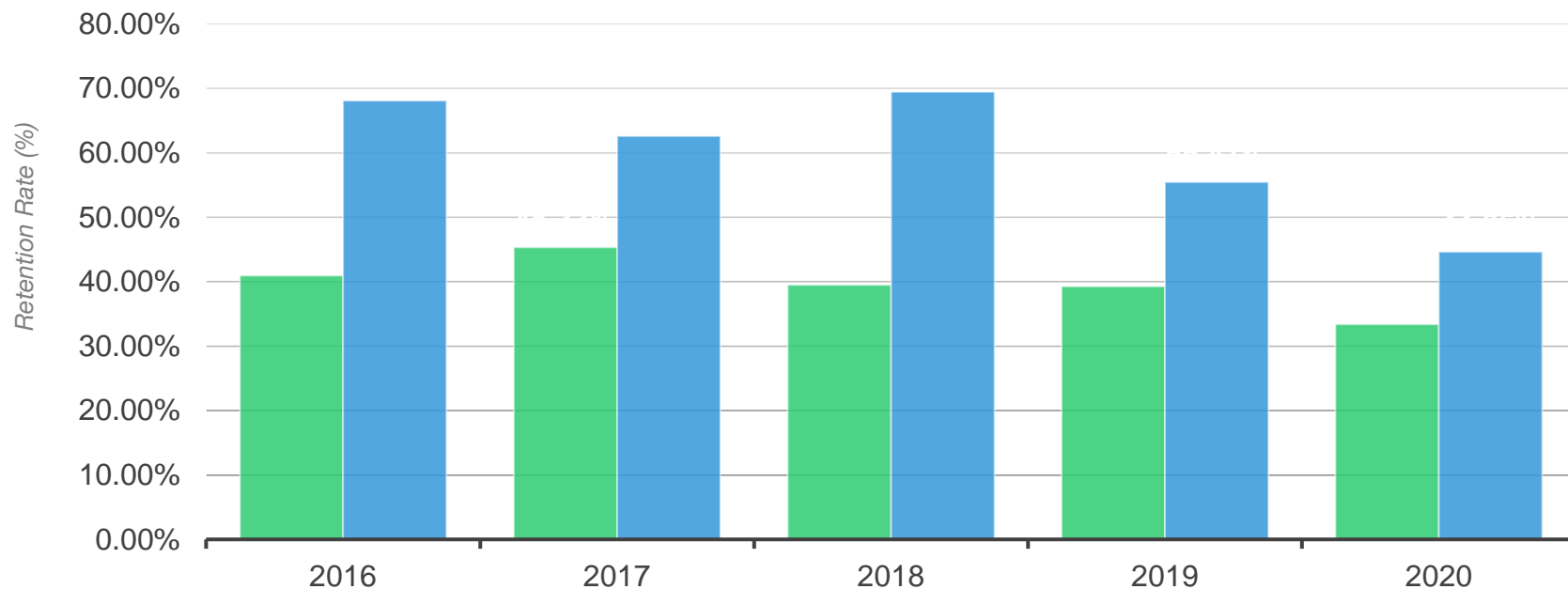




[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

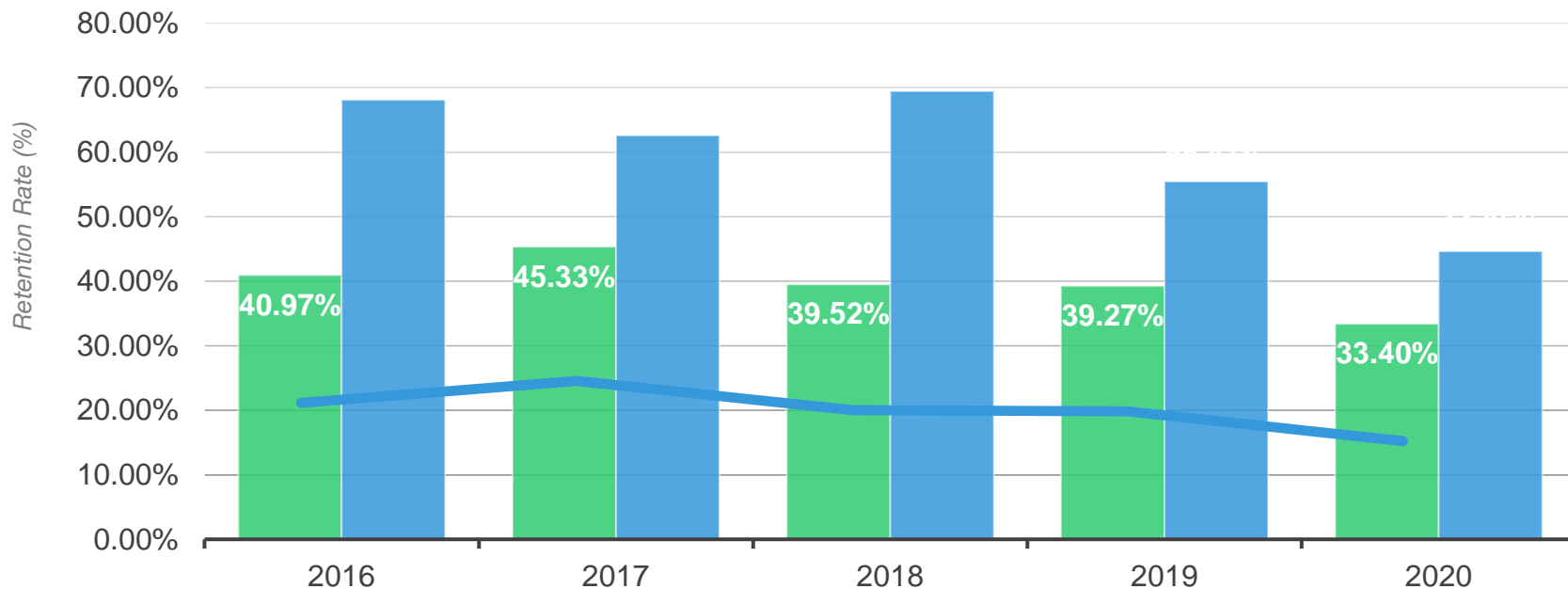


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

## Donors Retained

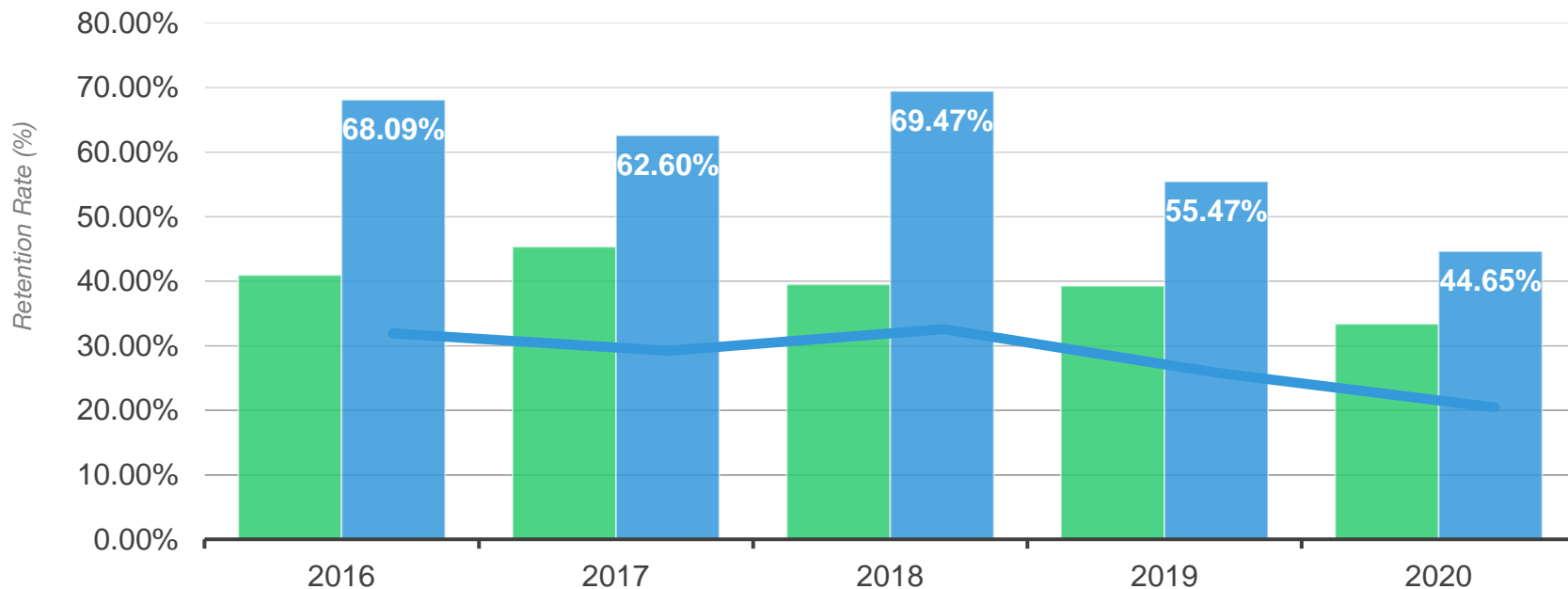


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

## Revenue Retained

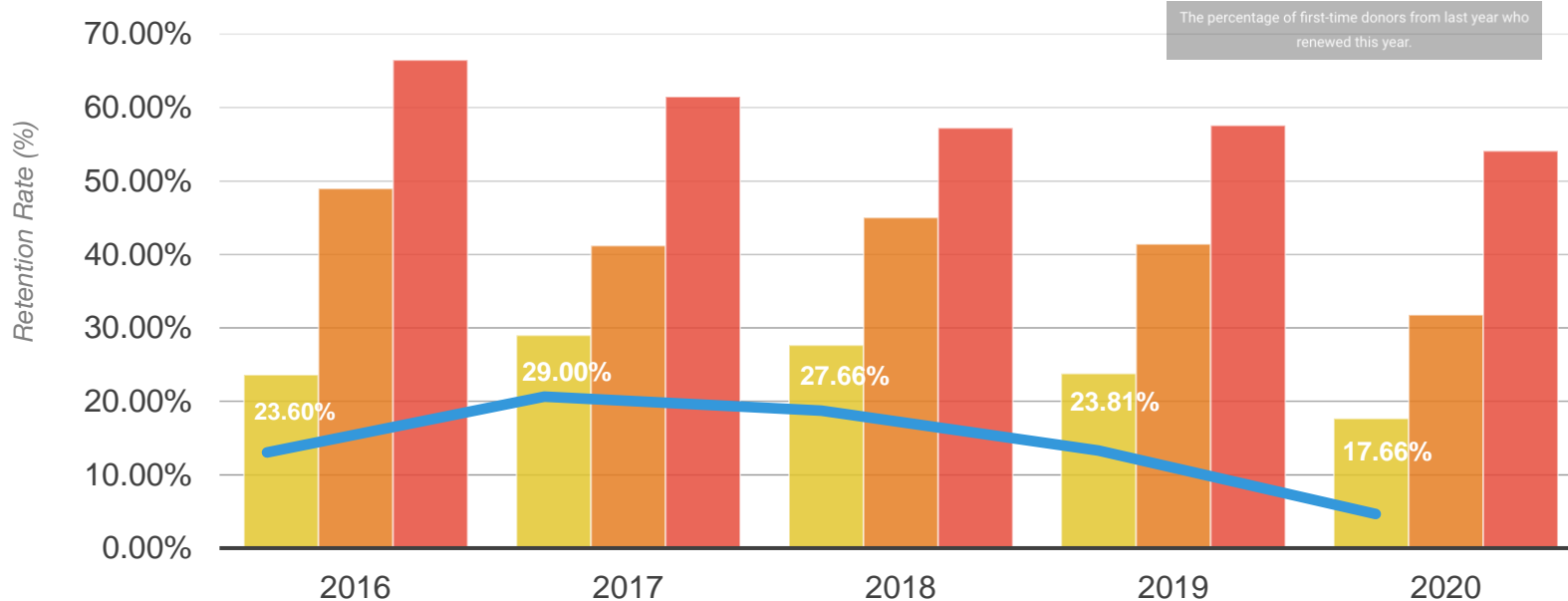


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

# FIRST TIME donor retention

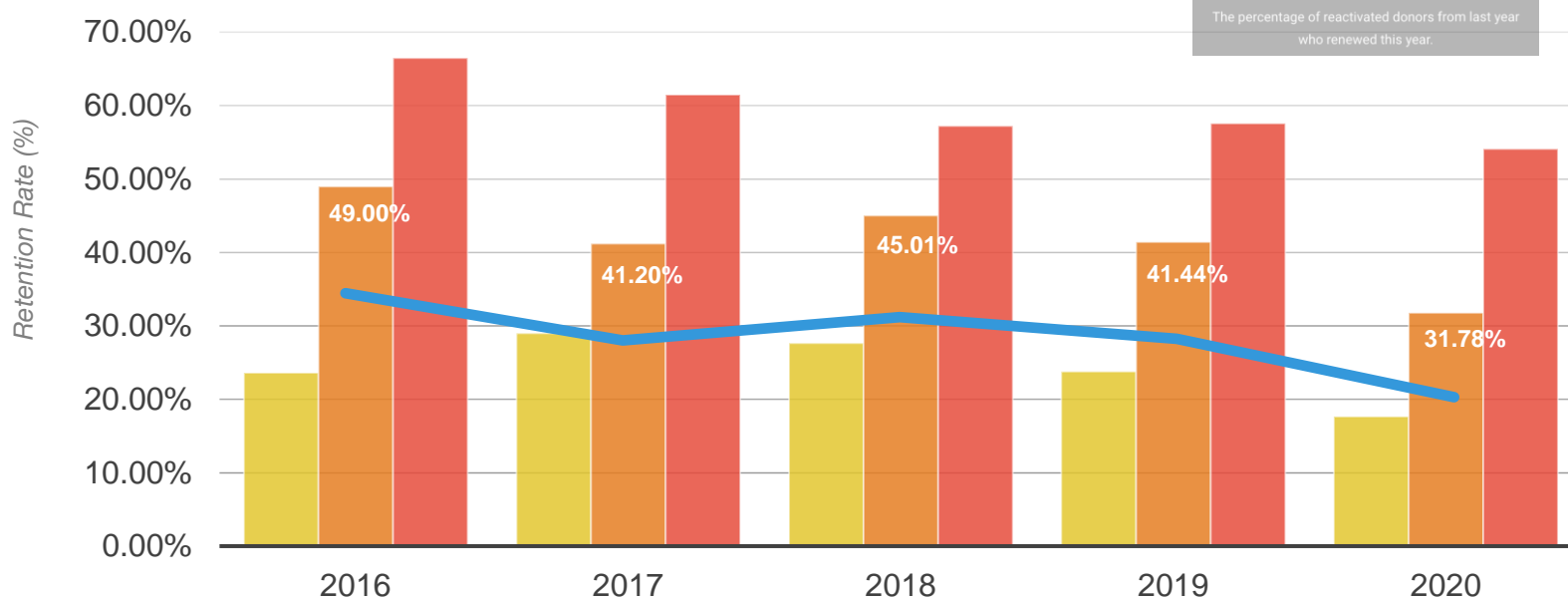


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

# REACTIVATED donor retention



[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

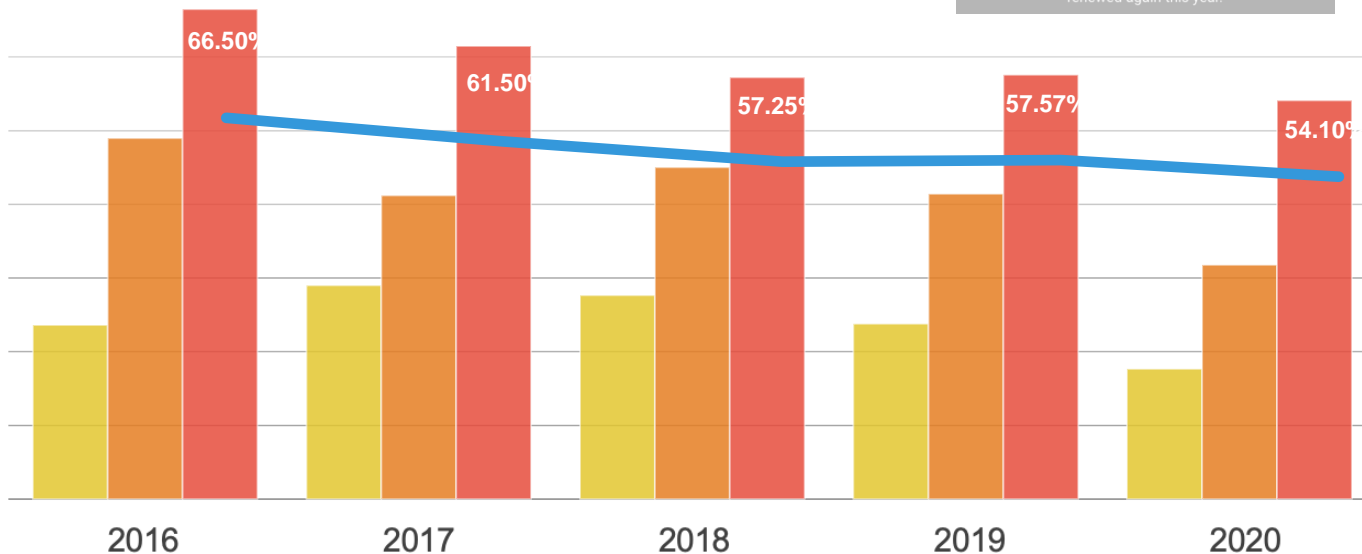


Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

# REPEAT donor retention

The percentage of retained donors from last year who renewed again this year.

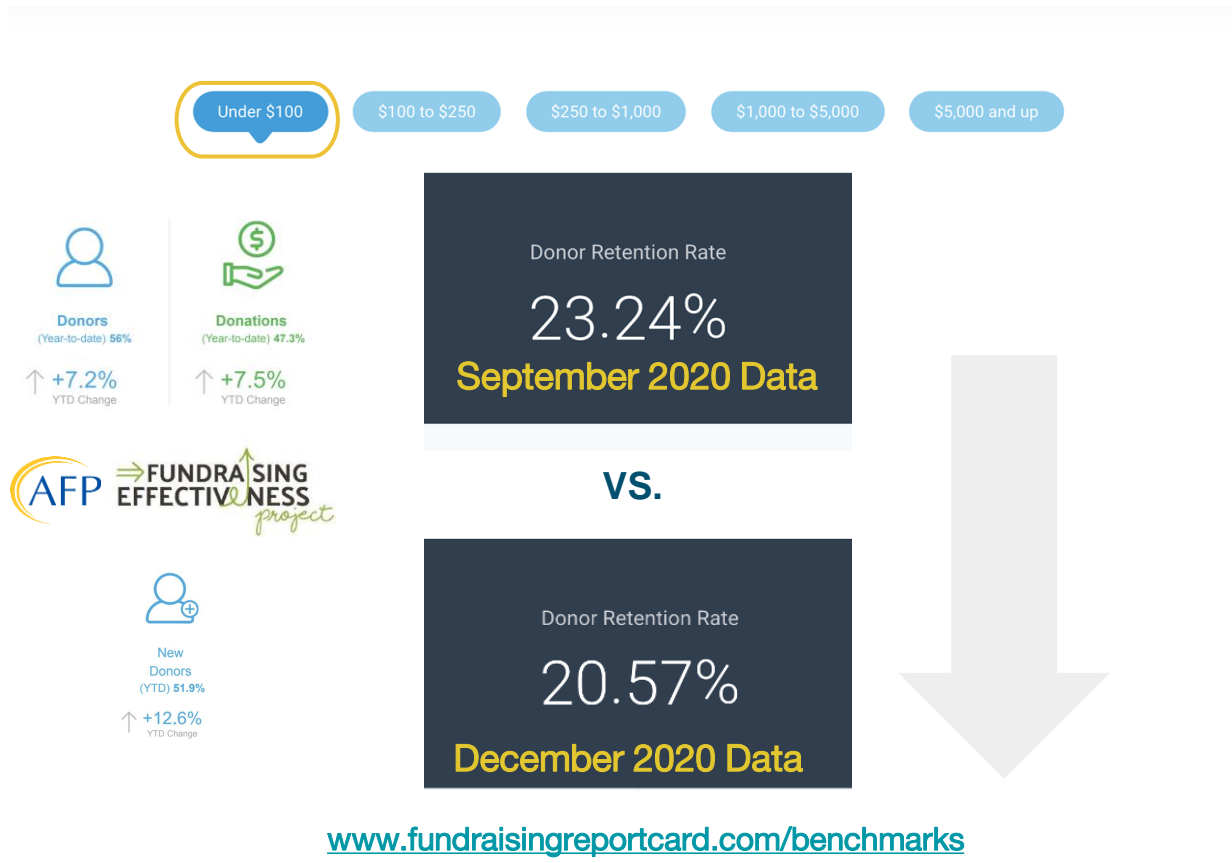
Retention Rate (%)



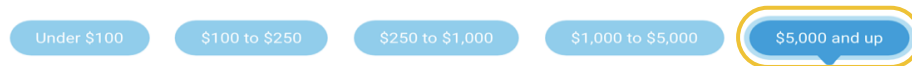
[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations







**VS.**



[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

# LOW-DOLLAR VS. HIGH DOLLAR DONORS

## Under \$100 donors

Under \$100   \$100 to \$250   \$250 to \$1,000   \$1,000 to \$5,000   \$5,000 and up

Average Donation Amount ⓘ

\$25.33

Donor Retention Rate

20.57%

Lifetime Value ⓘ

\$45.44

## Over \$5,000 donors

Under \$100   \$100 to \$250   \$250 to \$1,000   \$1,000 to \$5,000   \$5,000 and up

Average Donation Amount ⓘ

\$29,341.93

Donor Retention Rate

39.06%

Lifetime Value ⓘ

\$75,217.69

December 2020 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

FUNDRAISING  
REPORT CARD



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

80/20 rule is now

67/.59



**Donors giving over \$5,000**

**= .59%** of an org's donor base  
but make up **67.28% (2/3)** of  
all donation revenue

**Donors giving under \$100**

**= 79.94%** of an org's donor base  
but make up only **7.81%** of  
all donation revenue

December 2020 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

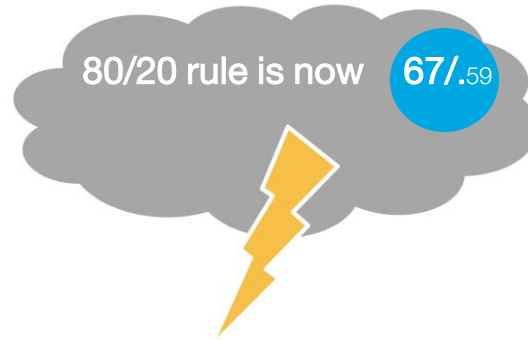
**FUNDRAISING  
REPORT CARD**



Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

# QUICK POLL

## #1



## Populist fundraising?

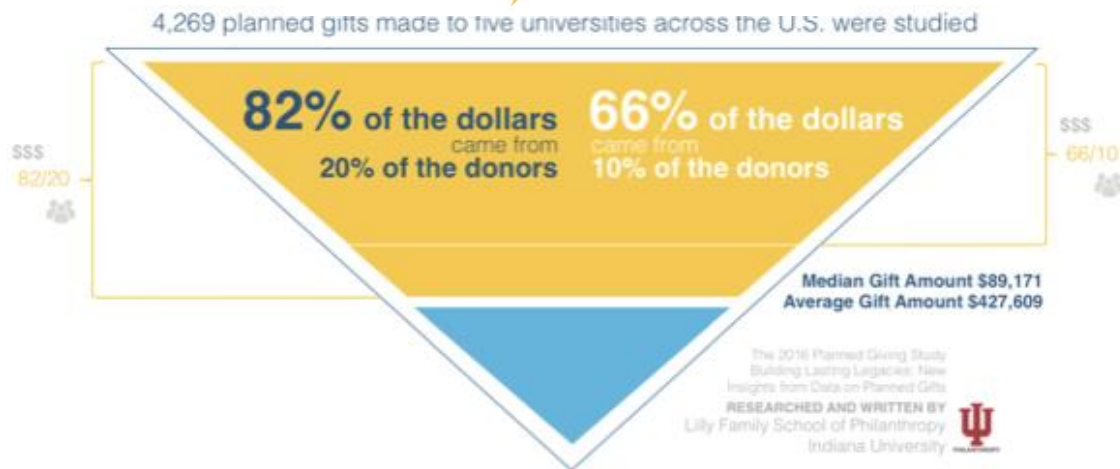
December 2020 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



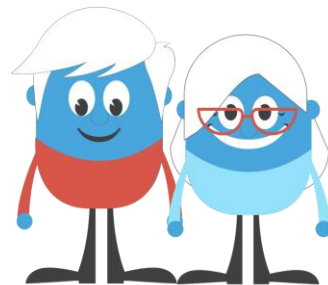
Daily analysis of \$77+ billion in charitable giving  
using data from 8,500+ organizations

80/20 rule is now 82/20



Channels fragmenting

Old channels

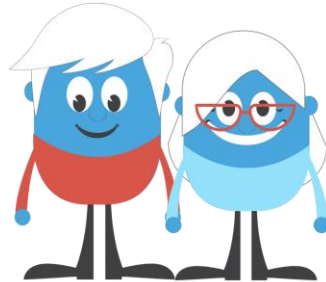




Old channels



New channels

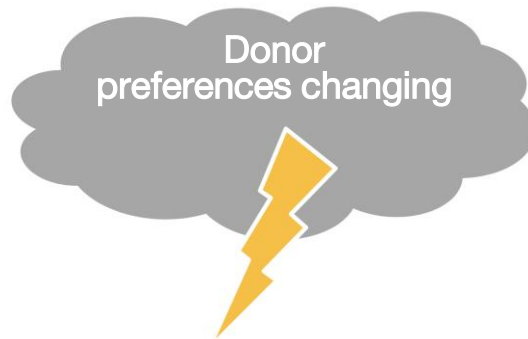
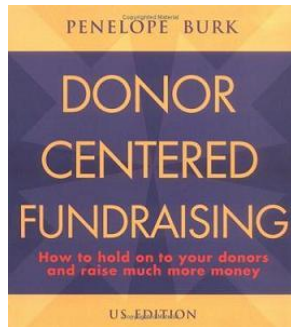


Google



Give Well

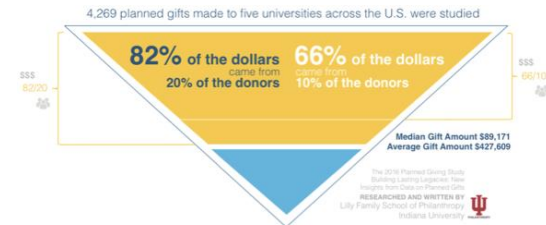




**Donor self-sufficiency is growing**

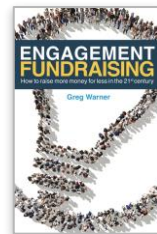
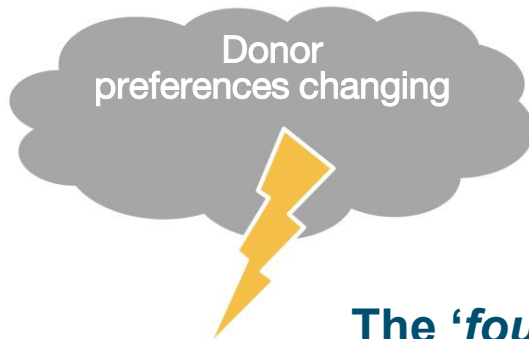
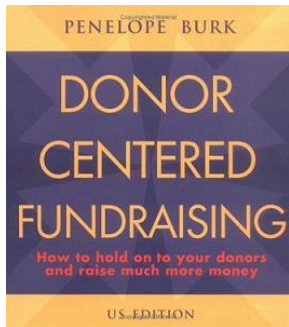
Surveyed 3,000 bequest donors

“Do you have a planned-gift officer?”



Only 18% said, “YES”

The majority said,  
“They give me everything I need, but I don’t need much from them.”



## Donor self-sufficiency is growing

### The 'four selfs'

Self-qualify	Allow opt-in / ask for permission
Self-educate	Make information accessible
Self-involve	Enable immersive engagement
Self-solicit	Support self-actuation / fulfillment

Donor  
preferences changing



JUNK MAIL



TELEMARKETING

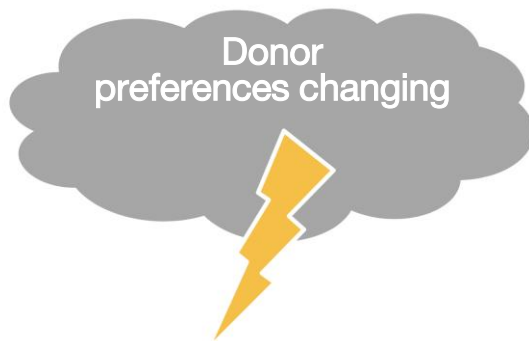


SPAM



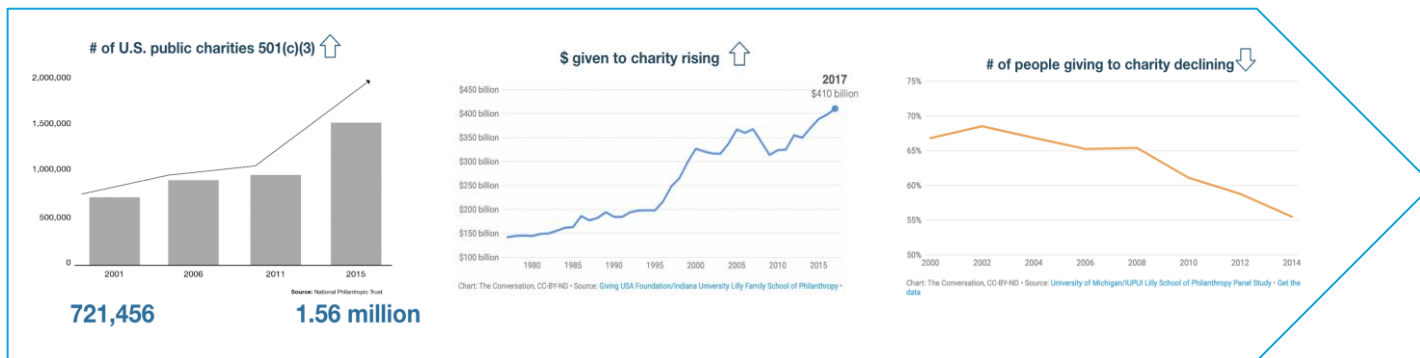
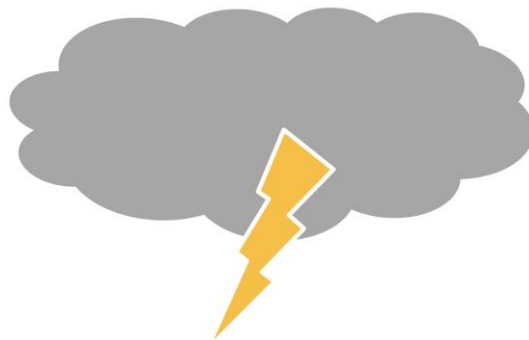


**Donor:** 92-year-old Olive Cooke  
**Mailings received:** 3,000+/year



**OPT-IN / PERMISSION**  
**OPT-OUT EASILY**





Competition increasing

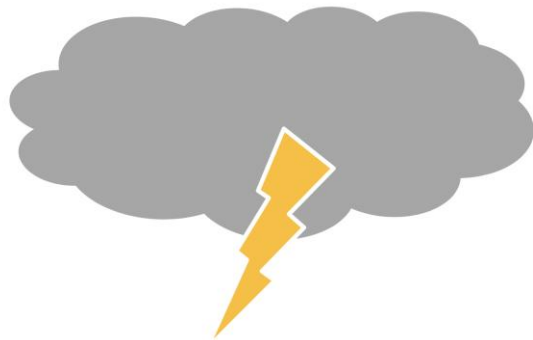
Less people giving

Trust declining

Fraction of donor base making up majority of revenue

Channels fragmenting

Preferences changing



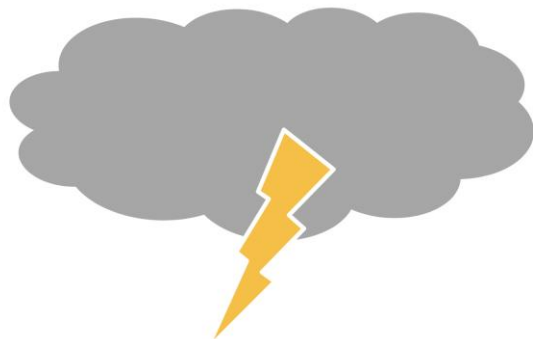
“

Giving is increasing because of **larger gifts from richer donors.**

**Smaller and mid-level donors** are slowly but surely **disappearing**—  
across the board among all organizations.”

Elizabeth Boris  
Chair of the Growth in Giving Initiative





“

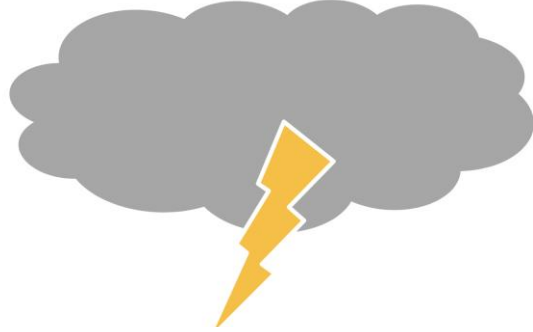
Nonprofit organizations in the United States are now being challenged by major political, demographic, economic, and technological factors outside of their control, and **most organizations find themselves flat-footed, unable to easily adapt.**”

Brian Lauterbach, ACFRE  
Vice President of Programs & Collective Impact

# QUICK POLL

## #2





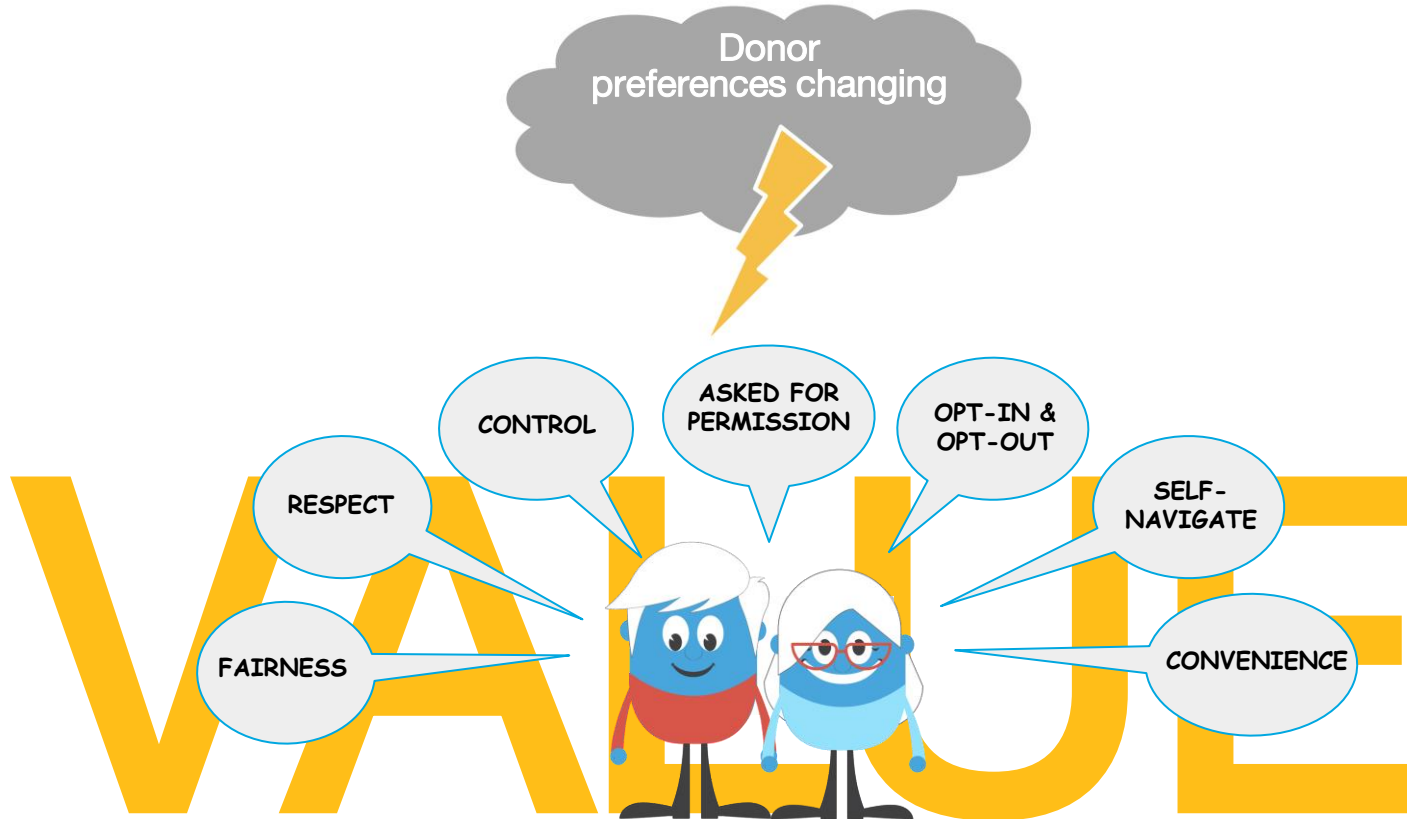
WHAT SHOULD WE DO?  
MORE?

Donor  
preferences changing



FEDUP!

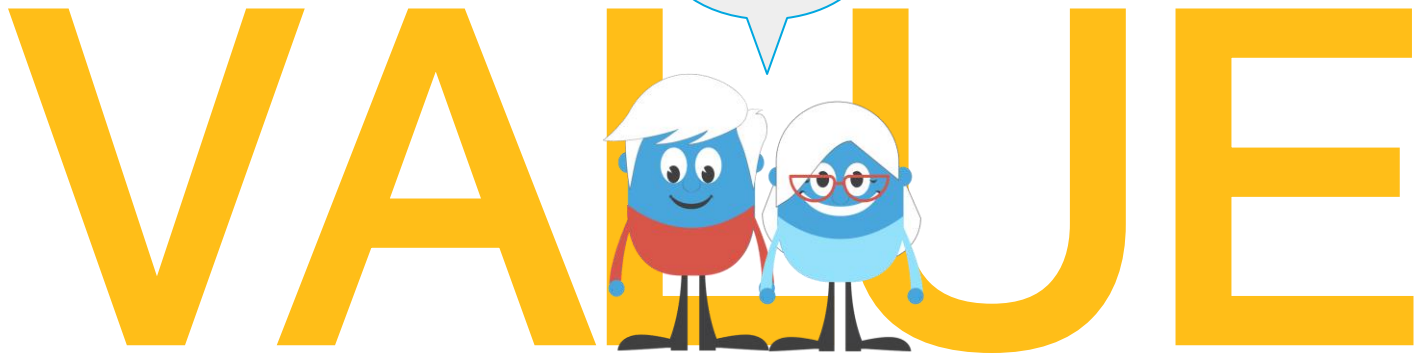


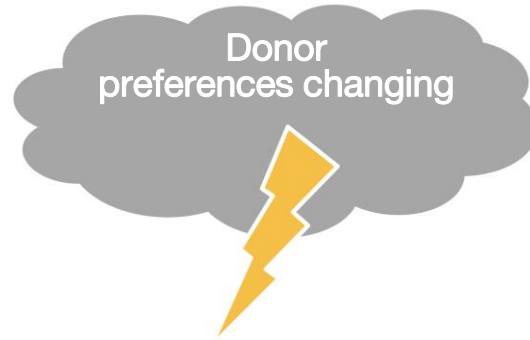


Donor  
preferences changing



WE'RE  
READY!





**“Hounding a donor for attention or action before they’re ready will only annoy them and burn your bridges.”**

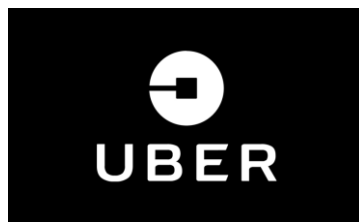


Greg Warner  
CEO & Founder  
**market**smart

## WINNERS VS. LOSERS



WIKIPEDIA  
*The Free Encyclopedia*



NETFLIX

TECHNOLOGY

# WINNERS VS. LOSERS

EDUCATION DIVE						
Deep Dive Opinion Library Events Jobs Topics						
SIGN UP SEARCH						
We're keeping track of major college and university closings, mergers, acquisitions and other consolidation from 2016 to the present. Did we miss something? Let us know by <a href="#">using this form</a> . <a href="#">Read our ongoing analysis of the list.</a>						
Institution	Region	Year	Type	Status	Deal	Dive Insight
Abington Memorial Hospital Dixon School of Nursing	Northeast	2017	Private	Nonprofit	Closed	
Abraham Baldwin Agricultural College	South	2017	Public	Nonprofit	Merged (Bainbridge State College)	
Alabama Southern Community College	South	2016	Public	Nonprofit	Merged (Faulkner State CC and Jefferson Davis CC)	
Allied American University	National	2016	Private	For-profit	Closed	
Altierus Career Colleges*	National	2017	Private	For-profit	Closed	
American Health Institute	South	2016	Private	Nonprofit	Closed	
American Jewish University (undergraduate program)	South	2018	Private	Nonprofit	Closed	
American School of Technology	Midwest	2016	Private	For-profit	Closed	
Argosy University*	National	2018	Private	Nonprofit	Closed	

<https://www.educationdive.com/news/tracker-college-and-university-closings-and-consolidation/539961/>

## MOODY'S

According to Moody's credit rating agency

“One in five small private colleges in the nation is under *‘fundamental stress’*. ”

“A quarter of private colleges are in the red.”

<https://www.insidehighered.com/quicktakes/2018/07/25/moodys-private-college-closures-11-year>

# WINNERS VS. LOSERS



NETFLIX

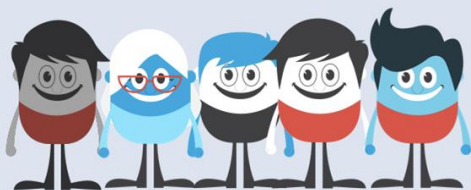
COSTS



# TECHNOLOGY



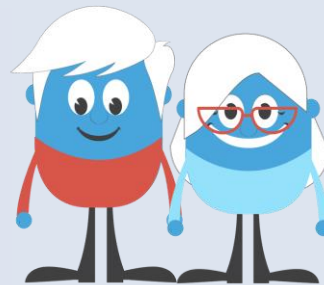
# WINNERS VS. LOSERS



BOARD & LEADERSHIP



FUNDRAISERS

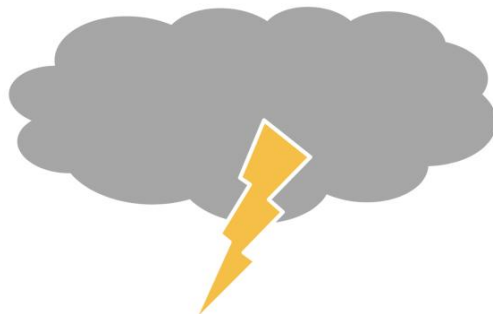


DONORS

# TECHNOLOGY

# FUNDRAISING CLIMATE CHANGE AND WHAT YOU CAN DO ABOUT IT

How to survive and thrive during the most turbulent yet transformative era ever to face fundraisers.





# WHAT YOU CAN DO ABOUT IT

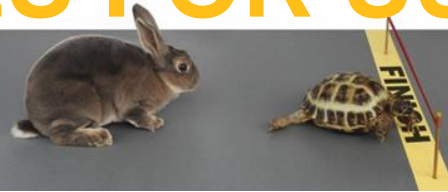


**TRADITIONAL  
INTERRUPTIVE,  
TRANSACTIONAL,  
ARMS-LENGTH APPROACH  
FOCUSED ON ASKING FOR SMALL GIFTS  
TO BE MADE MOSTLY IMPULSIVELY BY DONORS**



WHAT YOU CAN DO ABOUT IT

# 3 STRATEGIES FOR SUCCESS

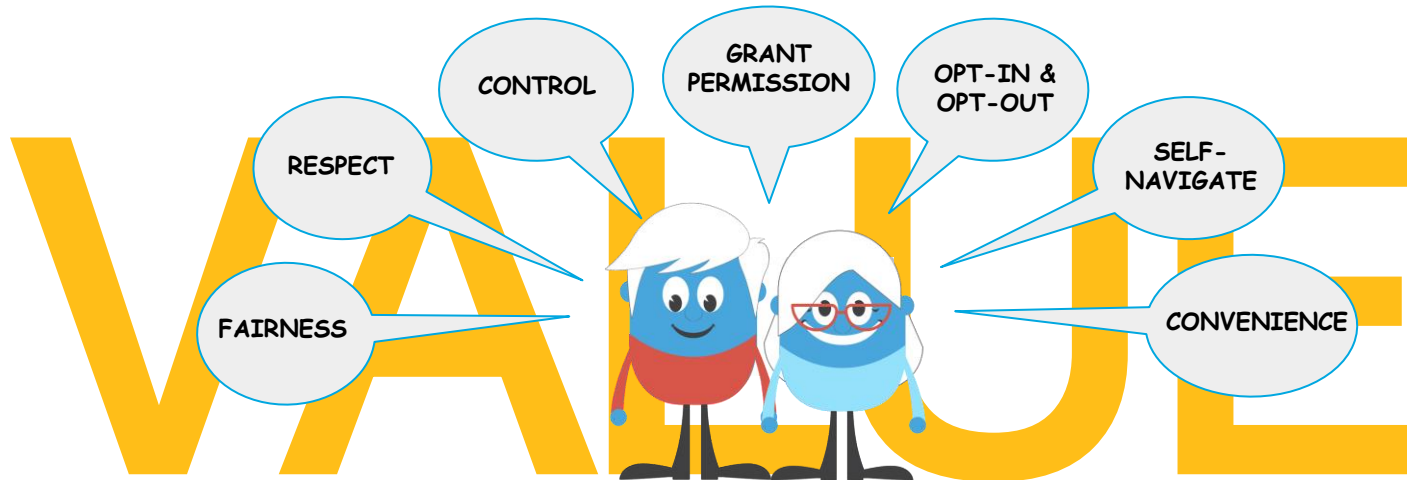


**A CONTEMPORARY,  
TECHNOLOGY-ENABLED,  
COMPASSIONATE APPROACH  
THAT HELPS SUPPORTERS SELF-NAVIGATE  
THE DECISION-MAKING PROCESS  
FOR HIGHLY-CONSIDERED  
(NOT TRANSACTIONAL) DECISIONS**



# WHAT YOU CAN DO ABOUT IT

## 3 STRATEGIES FOR SUCCESS





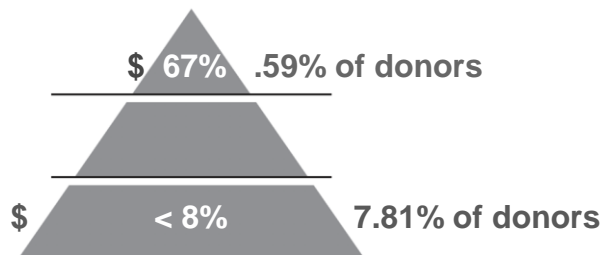
# WHAT YOU CAN DO ABOUT IT



# WHAT YOU CAN DO ABOUT IT

## 1 FOCUS ON THE 80/20 OR 67/.59

**% of your fundraising  
REVENUE \$**





# WHAT YOU CAN DO ABOUT IT

## 1 FOCUS ON THE 80/20 OR 67/.59

### Find new major donors at low cost

#### Referrals

Do you have any friends/colleagues/family members who would be interested in furthering Benedictine College's mission?

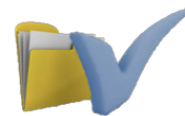
☒ Yes

☐ No

Please let us know the most convenient way to connect.

☒ I would be happy to make a personal introduction.

☐ I would like to share information about Benedictine College with them on my own; please provide that for me.



**Board meeting packets**

PREVIOUS

NEXT





# WHAT YOU CAN DO ABOUT IT

1

**FOCUS ON THE 80/20 OR 67/.59**

They are in your midst

49.7%

of high net worth  
individuals volunteer

**Find new major donors  
at low cost**

They are testing you

55.9%

volunteer at 2 or  
more organizations

✓ Referrals

✓ Volunteers

They want to give

84.3%

gave to some, most or all of  
the organizations for which  
they volunteer

Source:  
2016 U.S. Trust® Study of High Net Worth Philanthropy  
Based on a survey of U.S. households with a net worth of \$1 million or more (excluding  
the value of their primary home) and/or an annual household income of \$200,000+



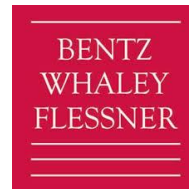
# WHAT YOU CAN DO ABOUT IT

## 1 FOCUS ON THE 80/20 OR 67/.59

### Find new major donors at low cost

- ✓ Referrals
- ✓ Volunteers
- ✓ Social media

facebook



**Cost only \$900**  
**43 new major**  
**donor prospects**  
signed up for a  
newsletter

#### Digital Major Gift Lead Generation

by Bentz Whaley Flessner on October 22, 2017 in Bentz Whaley Flessner

#### CASE STUDY 1

##### Background

A southern, top-tier research university was approaching the end of a \$1+ billion dollar campaign when they had the opportunity to relocate their medical school as part of a new municipal redevelopment plan. Their top donors were already committed to the existing campaign priorities, and they needed a creative solution to open doors to people who had never supported the university. They turned to Bentz Whaley Flessner (BWF) to help develop a new digital strategy.

While social media has long been recognized as a tool for annual giving programs, the information these companies are collecting is massive. They know individuals' interests, social connections, education, and other behavioral data – and now they are purchasing the data and layering onto their records the data used to drive wealth scores. The result is an amazing (perhaps alarming) marketing tool.

##### Campaign

Working with BWF experts the university's marketing team used Facebook's back end tools to build a custom audience. Their target audience was looking for individuals who had:

- A net worth of \$1 million or more.
- A history of giving to cancer and other health causes.
- Lived within a 25-mile radius of the downtown metropolitan center where the new facility would open.

<https://www.bwf.com/bwf/digital-major-gift-lead-generation/>



# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION

UNDERSTAND  
**WHO** THEY ARE  
**WHY** THEY CARE  
& **WHERE** THEY ARE  
IN THEIR CONSIDERATION PROCESS



# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION

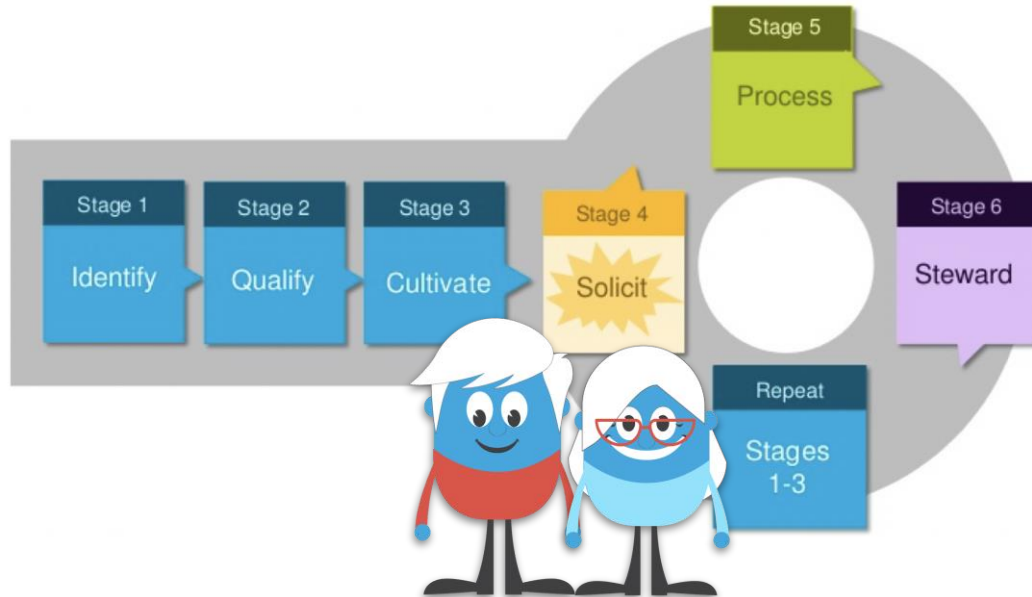
FOCUS MORE  
ON THEM AND THEIR NEEDS

FOCUS LESS  
ON YOUR PROCESS



# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION

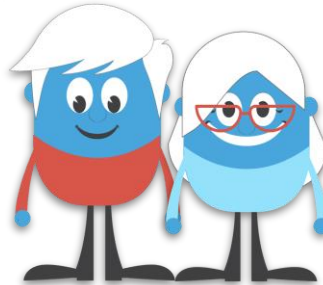




# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION

**LOW-DOLLAR  
IMPULSE-ORIENTED  
DECISIONS**



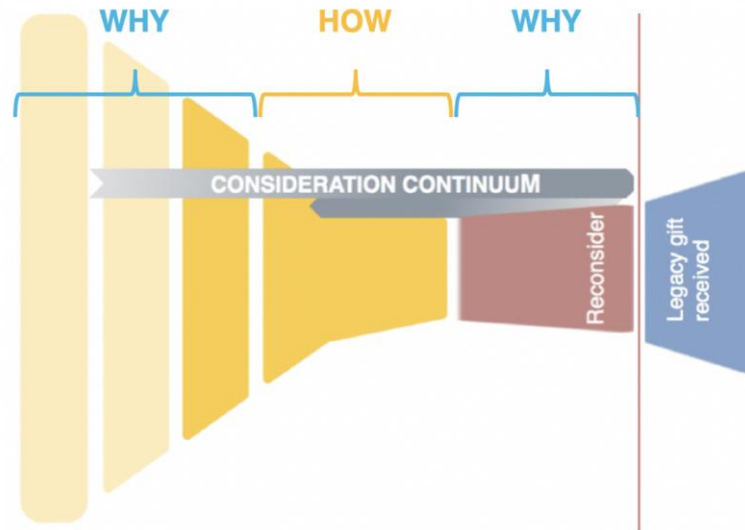
**HIGH-DOLLAR  
HIGHLY-CONSIDERED  
DECISIONS**





# WHAT YOU CAN DO ABOUT IT

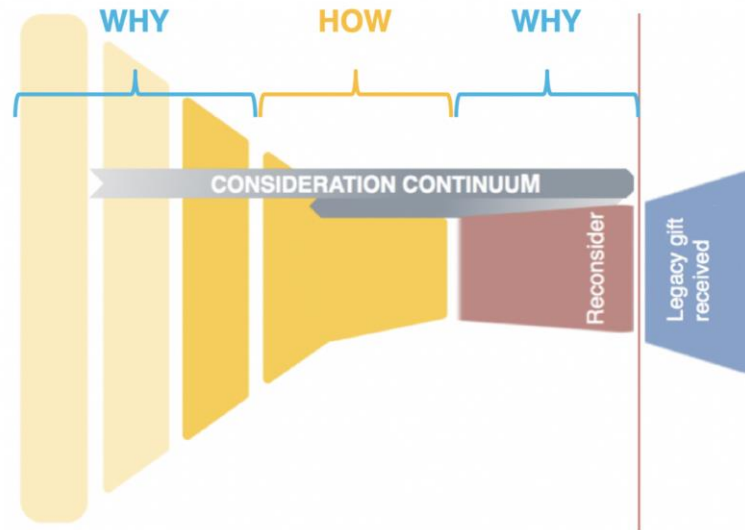
## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION





# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION



**BUILD TRUST  
BY DELIVERING  
VALUE**





# WHAT YOU CAN DO ABOUT IT

## 2 SUPPORT YOUR SUPPORTERS AND THEY'LL SUPPORT YOUR MISSION

### HELP THEM

- ✓ Build trust in you
- ✓ Think about their lives
- ✓ Contemplate their own heroism
- ✓ See others finding joy from giving
- ✓ Socialize with like-minded people
- ✓ Etc.

**BUILD TRUST  
BY DELIVERING  
VALUE**



# WHAT YOU CAN DO ABOUT IT

2

## SUPPORT YOUR SUPPORTERS

AND THEY'LL SUPPORT YOUR MISSION

### LEARN ABOUT THEM

- ✓ Why do they care?
- ✓ Who inspired them to care?
- ✓ What are their interests?
- ✓ What are their needs?
- ✓ Etc.

**BUILD TRUST  
BY DELIVERING  
VALUE**



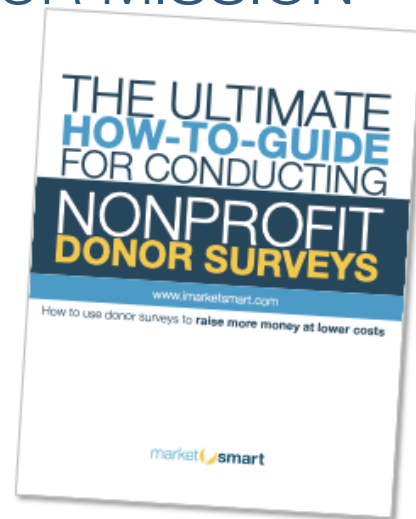
# WHAT YOU CAN DO ABOUT IT

2

## SUPPORT YOUR SUPPORTERS

AND THEY'LL SUPPORT YOUR MISSION

**DONOR SURVEYS**  
**TECHNOLOGY**  
for donor discovery,  
qualification & prioritization





# WHAT YOU CAN DO ABOUT IT

2

The screenshot shows the Benedictine College website with a navigation bar at the top. A blue circle highlights the 'GIVING TOOLKIT' link in the navigation bar. Below the navigation bar, a modal window titled 'Give from your donor-advised fund:' is open. The modal contains a search bar with 'Fidelity' entered, and two options: 'FIDELITY CHARITABLE' (highlighted) and 'FIDELITY INVESTMENTS CHARITABLE GIFT FUND'. Below the options, it says 'YOU AGREE TO THE [TERMS OF SERVICE AND PRIVACY POLICY](#).' A blue circle highlights the 'DONATE NOW' button in the top right corner of the page. Another blue circle highlights the 'MEET PEOPLE LIKE LI' link in the left sidebar. Below the modal, there are two main sections: 'YOUR COLLEGE — NOW AND LATER' and 'THE IMPACT YOU HAVE'. The 'YOUR COLLEGE — NOW AND LATER' section has a 'READ MORE' button. The 'THE IMPACT YOU HAVE' section has a 'TELL ME MORE' button. At the bottom, a blue circle highlights the 'EASY WAYS TO MAKE AN IMPACT' link.

**BENEDICTINE COLLEGE**  
ATCHISON, KANSAS

Give now from your Donor-Advised Fund

DONATE NOW TAKE OUR SURVEY

HOME SHARED VISION WHY GIVE MAKE AN IMPACT SUPPORTERS LIKE YOU BLOG CONTACT US GIVING TOOLKIT

Give from your donor-advised fund:

Fidelity

FIDELITY CHARITABLE

FIDELITY INVESTMENTS CHARITABLE GIFT FUND

YOU AGREE TO THE [TERMS OF SERVICE AND PRIVACY POLICY](#).

MEET PEOPLE LIKE LI

DON'T SEE YOUR FUND? LET US KNOW.

YOUR COLLEGE — NOW AND LATER

THE IMPACT YOU HAVE

As a fellow Raven, whether you're an alum, parent or friend of the College, you know what is important to you for Benedictine and what you envision for its future. We want you to see how, together, we're stewarding that vision.

READ MORE


You've helped us make great strides toward improvements to Benedictine College that will help educate America's future leaders. There's still more we can achieve together.

TELL ME MORE

EASY WAYS TO MAKE AN IMPACT




2



**BENEDICTINE**  
COLLEGE  
ATCHISON, KANSAS

[Give now from your Donor-Advised Fund](#)  
[DONATE NOW](#) [TAKE OUR SURVEY](#)


[HOME](#) [SHARED VISION](#) [WHY GIVE](#) [MAKE AN IMPACT](#) [SUPPORTERS LIKE YOU](#) [BLOG](#) [CONTACT US](#) [GIVING TOOLKIT](#)



### MEET PEOPLE LIKE YOU

Accomplishing Benedictine 2020 goals — you're making it happen!


### #WHEREGREATNESSBEGINS



#### YOUR COLLEGE — NOW AND LATER

As a fellow Raven, whether you're an alum, parent or friend of the College, you know what is important to you for Benedictine and what you envision for its future. We want you to see how, together, we're stewarding that vision.

[READ MORE](#)



#### THE IMPACT YOU HAVE

You've helped us make great strides toward improvements to Benedictine College that will help educate America's future leaders. There's still more we can achieve together.

[TELL ME MORE](#)

### EASY WAYS TO MAKE AN IMPACT



# WHAT YOU CAN DO ABOUT IT

3

## GIVE TO YOUR GIVERS

THE LAW OF RECIPROCITY IS POWERFUL





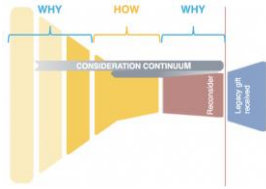
# WHAT YOU CAN DO ABOUT IT

3

## GIVE TO YOUR GIVERS

THE LAW OF RECIPROCITY IS POWERFUL



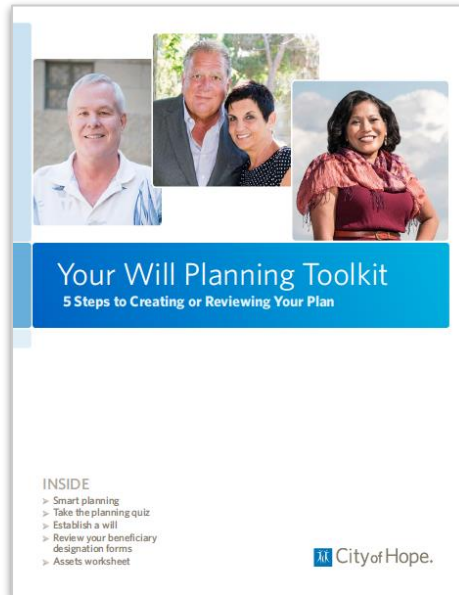


# WHAT YOU CAN DO ABOUT IT

3

## GIVE TO YOUR GIVERS

THE LAW OF RECIPROCITY IS POWERFUL







- 1 FOCUS ON THE 80/20**
- 2 SUPPORT YOUR SUPPORTERS**  
AND THEY'LL SUPPORT YOUR MISSION
- 3 GIVE TO YOUR GIVERS**  
THE LAW OF RECIPROCITY IS POWERFUL



# WHAT YOU CAN DO ABOUT IT

**BONUS**

**FOCUS MORE ON BEQUEST GIVING**



**Donna**

\$250 annual  
fund donation

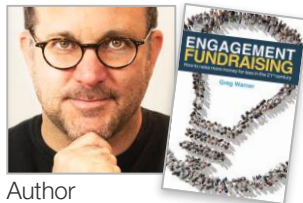


**Sharon**

\$57,000  
legacy gift

**Donna** would have to give for **228 years** to  
**equal** the impact of **Sharon's legacy gift**

# THANK YOU



Author  
Engagement  
Fundraising  
Greg Warner  
CEO & Founder

Buy it here:  
[www.engagementfundraisingbook.com](http://www.engagementfundraisingbook.com)

Or order a free copy by emailing:  
[info@imarketsmart.com](mailto:info@imarketsmart.com)



Connect with me on LinkedIn:  
[www.linkedin.com/in/gregmarketsmart/](http://www.linkedin.com/in/gregmarketsmart/)

Inventor  
**FUNDRAISING  
REPORT CARD** 

[www.fundraisingreportcard.com](http://www.fundraisingreportcard.com)  
[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

market  smart  
[www.imarketsmart.com](http://www.imarketsmart.com)

## Start with a **SURVEY**



Online landing pages



Online opt-in forms  
or surveys

Tech-enabled donor  
discovery at scale

## Start with a **SURVEY**



Online landing pages



Online opt-in forms  
or surveys

Tech-enabled donor  
discovery at scale

## Automate your **EMAILS**



Build trust, grow relationships &  
drive engagement with highly  
relevant cultivation

## Start with a **SURVEY**



Online landing pages



Online opt-in forms  
or surveys

Tech-enabled donor  
discovery at scale

## Automate your **EMAILS**



Build trust, grow relationships &  
drive engagement with highly  
relevant cultivation

## Start with a **SURVEY**



Online landing pages



Online opt-in forms  
or surveys

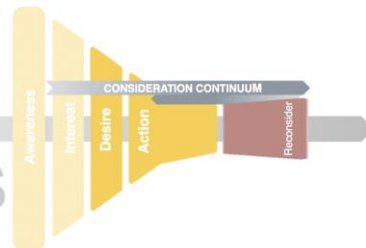
Tech-enabled donor  
discovery at scale

## Automate your **EMAILS**



Build trust, grow relationships &  
drive engagement with highly  
relevant cultivation

## Engage with **EFFORTS**



Increase donor interest &  
desire with novel,  
value-oriented efforts

## Prioritize with your **DASHBOARD**



Prioritize outreach based on  
recency of engagement,  
passion, interest & capacity

## Start with a **SURVEY**



Online landing pages



Online opt-in forms  
or surveys

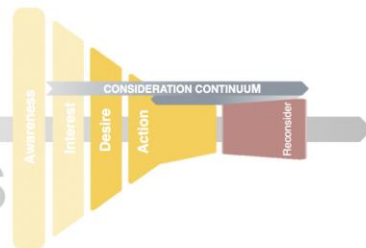
Tech-enabled donor  
discovery at scale

## Automate your **EMAILS**



Build trust, grow relationships &  
drive engagement with highly  
relevant cultivation

## Engage with **EFFORTS**



Increase donor interest &  
desire with novel,  
value-oriented efforts

## Prioritize with your **DASHBOARD**



Prioritize **outreach** based on  
recency of engagement,  
passion, interest & capacity

\$



Meet & facilitate  
giving



# Return on investment

## Immediate ROI

(Return on investment)

10x



“

**\$60 returned for every \$1 invested**  
and we haven't really scratched the  
surface yet.”



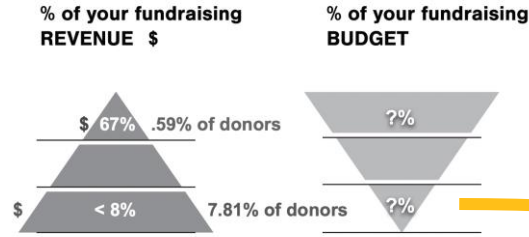
Jonelle Beck  
Executive Director, Office of Estate & Gift Planning  
Assistant General Counsel for Trusts & Estates  
University of the Pacific

## Lifetime value ROI

(Return on investment)

100x

## 1 FOCUS ON THE 80/20 OR 67/.59



Consider a test with just  
**1% of your budget**



# ENGAGEMENT FUNDRAISING CHALLENGE



## NO RISK OFFER

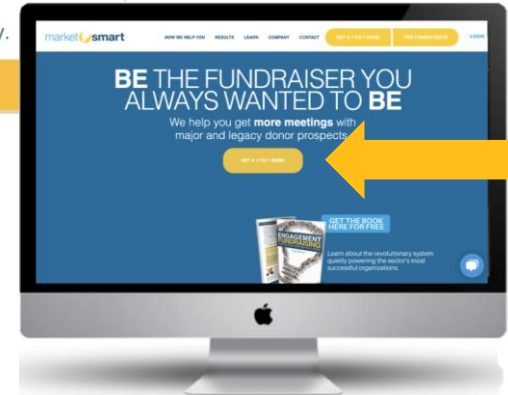
Assign us less than **1%**  
of your fundraising budget

# Get 10:1 ROI

guaranteed or your money back\*

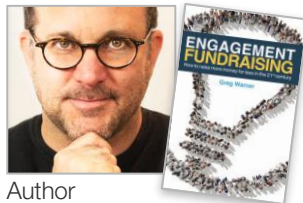
\*For qualified organizations only. Terms & conditions apply.

[imarketsmart.com](http://imarketsmart.com)



marketsmart  
[www.imarketsmart.com](http://www.imarketsmart.com)

# QUESTIONS?



Author  
Engagement  
Fundraising  
Greg Warner  
CEO & Founder

Buy it here:  
[www.engagementfundraisingbook.com](http://www.engagementfundraisingbook.com)

Or order a free copy by emailing:  
[info@imarketsmart.com](mailto:info@imarketsmart.com)



Connect with me on LinkedIn:  
[www.linkedin.com/in/gregmarketsmart/](http://www.linkedin.com/in/gregmarketsmart/)

Inventor  
**FUNDRAISING  
REPORT CARD** 

[www.fundraisingreportcard.com](http://www.fundraisingreportcard.com)  
[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

market  smart  
[www.imarketsmart.com](http://www.imarketsmart.com)