



**2023 RNL NATIONAL
DONOR ENGAGEMENT
WORKSHOP** July 26-27

WELCOME



Trends in Donor Acquisition and Giving

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Today's key question:

*How do we move beyond the single year **ask, gift, thank and repeat** cycle to create real, sustainable, acquisition programs that bolster and strengthen pipeline goals?*



The Landscape for Acquisition

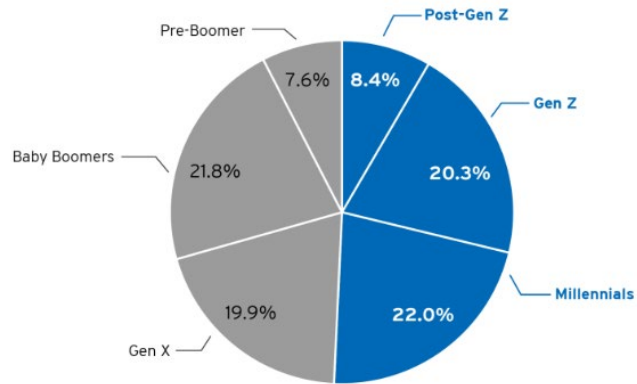
*“what we’ve always done”
is not going to work any more.*

Millennials and Gen Z

Are you aligned with these groups to grow?

FIGURE 2

Share of US population by generation



Numbers pertain to July 1, 2019

Note: Birth years are as follows: Post Gen Z (2013+), Gen Z (1997-2012), Millennials (1981-1996), Gen X (1965-1980), Boomers (1946-1964), Pre-Boomer (1945 and earlier).

Source: William H. Frey analysis of Census Bureau population estimates released June 25, 2020.

B Metropolitan Policy Program
at BROOKINGS



Does your donor pool reflect the current U.S. population?

Examine Your Preconceptions

Myth: Younger Generations Don't Have Capacity to Give.

Fact: Millennial average wealth doubled in the pandemic.

...and 39% report making gifts of more than \$500.

Schuler/Bank of America 2022 Study/RNL National Young Alumni Survey and Pew Research data

\$33 Trillion



Purchasing
Power of Gen Z

Examine your Preconceptions

Myth: Younger generations aren't philanthropic.

Fact: More than 80% give to some cause each year.

Schuler/RNL National Young Alumni Survey and Pew Research data

< 8%



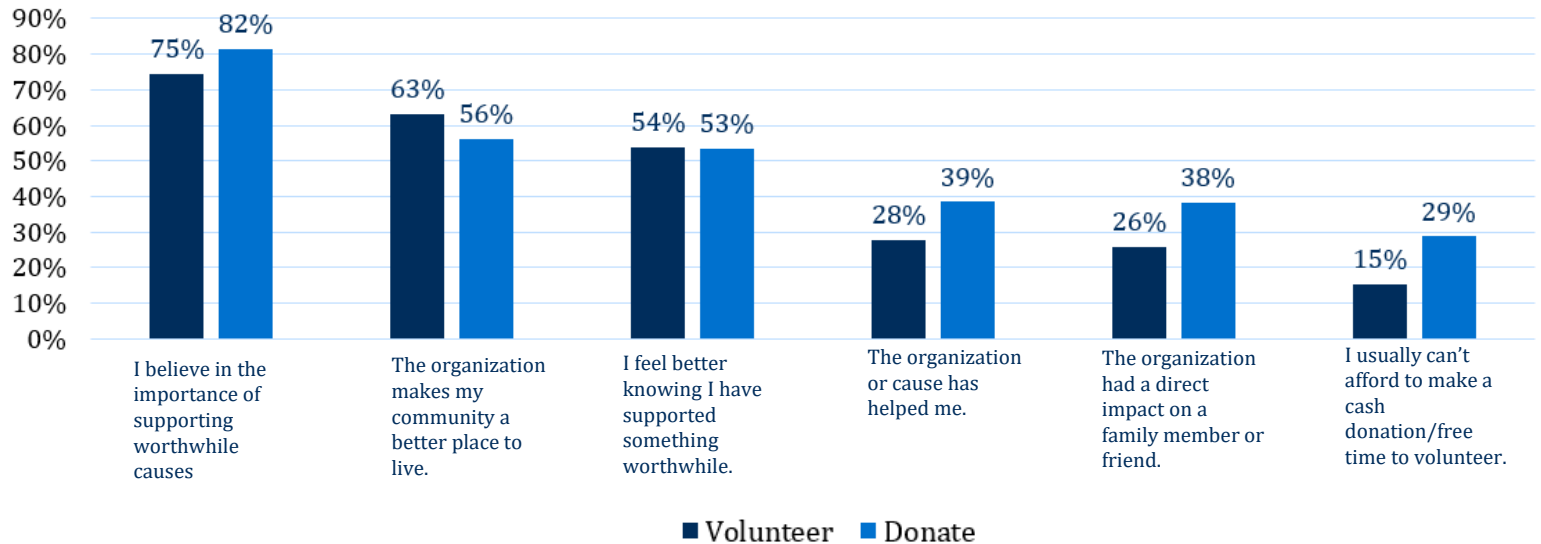
Give to their alma mater each year.

Source: CASE VSE data

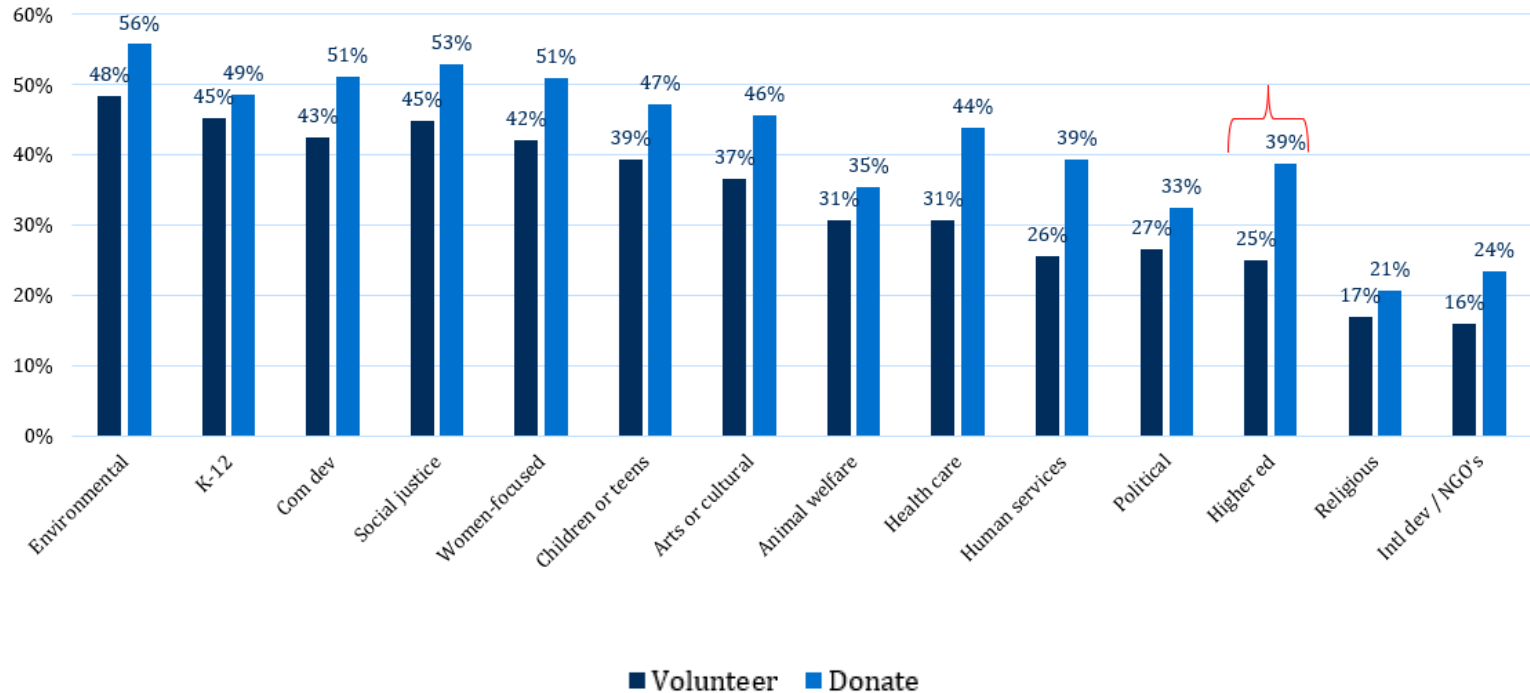
Understand What Motivates Givers

Are your methods welcoming donors or gatekeeping them?

What motivates you to volunteer/donate in support of an organization or cause? Select all that apply.



“If you had the resources, which types of orgs would you like to support?”



A woman with curly hair is smiling and looking at a laptop. In the background, other people are working in an office environment. The entire image has a blue tint.

The Good News?

**Your Organization is already
many of these things.**

Let's Get Started!

Stages and Strategies for Sustainable Success

Are you ready to acquire donors?

Are you asking to acquire **and** retain?

Are you ready for what comes next?

1

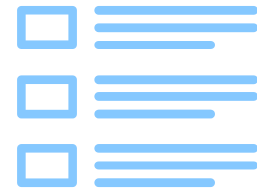


Improve Success Before You Even Ask

Knowledge (data) is power

Do you know what you need to know and is it accurate?

- Accurate contact info.
 - *For younger generations, 36% of contact data decays every year.*
- Do you know about their affinities, interests, and lives?
 - *Clubs and activities, career status, life stage, relationships, preferences, passions, attitudes.*



11010
01101
10011



Get up to speed

Strategies to update key info

- Conduct outreach campaigns for **data updates**
- **Use all channels** (mail, email, phone, text, digital) and complete on a regular basis.
- Pull over **complete and accurate information.**
- Work with internal data holders to get critical affinity info.
- Conduct **market research, surveys, or develop personas** and have actionable plans for the data points received.
- Consider **engagement scores or data modeling** to narrow the pool and see better ROI.

A group of people, including a man with glasses and a beard, a woman with glasses, and a man with a beard, are sitting around a table in a meeting. They are looking at a laptop screen. The background is a modern office setting with large windows and a whiteboard. The image has a blue tint.

Idea:

Leverage young alumni networks to focus group and expand reach of message.

What have you done for them lately?

Engagement and warming before the ask

- Useful and Fun Outreach
 - Alumni/prospect benefits communication
 - Check in and personal messages – birthdays, anniversaries, career/professional achievements, family milestones
 - Professor, Group Leader, Coach, or Caregiver outreach
 - Digital “gifts”
- Sense of Connection, Belonging, and Ownership
 - Volunteering – make it accessible
 - Regional clubs and events
 - Affinity groups and networks (online or in-person)
 - Chances to share input and feel heard

A woman with dark hair, wearing glasses and a light-colored blazer, is seated at a desk. She is looking towards the left of the frame with a thoughtful expression, her chin resting on her hand. In front of her is an open laptop. The background is slightly blurred, showing what appears to be a modern office or meeting room with a white lattice partition. The entire image has a blue tint.

Idea:

Ask constituents to vote on fundraising campaigns or premiums.

Have you built trust?

What do they know about giving to you?

- Impact stories in organizational publications
 - Focus on all levels not just major/campaign gifts.
- Digital/Social outreach on main channels
 - Not just asks and not just on giving day
- On-campus or on-site signage, flyers, or handouts
- Organizational partnerships to spread awareness
- Events and celebrations
- Champions and Ambassadors



44% give for direct impact of the cause on their family, friends, or themselves.



42% give if the cause clearly demonstrates the impact.



1 in 10

young alumni strongly agree that their gift to their alma mater makes a difference

Can they give the way they want?

Are we welcoming in or turning away?

- Can constituents give to their passions **through** your org or just **to** your org?
 - Cause-based funds and crowdfunding
 - Remember – a donor is a donor, we can educate and shape the relationship after first gift.
- Is it EASY to give?
 - FAQs and access to staff for questions?
 - Mobile friendly, accessible giving sites (low click count, minimal data entry)
- Do you offer all giving options?

A woman with curly hair is smiling and looking towards the camera while sitting at a desk with a laptop. In the background, other people are working in a collaborative office environment. The entire image has a blue tint.

Idea:

*Use Crowdfunding or
Giving Days to feature
student orgs*

Is it easy to give?

Consider all generations and options

- FAQs and access to staff for questions
- Mobile friendly, accessible giving sites (low click count, minimal data entry)
- Sustaining or recurring gift options
- Trend Alert: Digital Wallets.



1/3
of gifts through
digital wallet



127%
increase in
online giving

(stats from all RNL partners)

Digital (mobile) Wallets

- According to J.D. Power 49% of Americans have used a digital wallet at some point in the previous three months. (up from 38% on previous report)
- The global market share of mobile wallets in e-commerce was 49% in 2022. *(Statista)*
- 48% of Gen Z have NEVER written a check. *(NerdWallet)*
- Prediction: 60% of the global population will be using digital wallets by 2026. *(Juniper Research)*

67%



Of Millennials have adopted digital wallets.

(oneinc.com)

2



Play the Long Game

The start of something that lasts

Ask to acquire and retain

- Set the expectation of retention
 - Does the ask seem like a one-and-done or will giving be a long-term, important relationship?
 - Are your ask amounts meaningful and not under-estimating the prospect?
- Use natural retention builders like giving days/challenges, anniversary outreach, loyalty societies, recurring/sustaining gifts.
- Prepare to quickly celebrate and acknowledge gifts in meaningful and consistent ways.

**To Premium or Not to
Premium? – That is the
Question.**

**The Answer: It Depends!
(but have next steps in mind.)**

A person is sitting at a desk, using a laptop. The laptop screen displays a website with a heart icon and the word 'DONATE'. The person's hands are visible on the keyboard. The background is a blurred office setting.

Idea:

If using a premium, build in a social/sharing element to tell a story and increase repeat giving.

3



**Lay the foundation for
long-term success**

Build a giving experience

Stay top of mind and top of philanthropic priorities

- Use Stewardship matrix and departmental collaborations to chart outreach and messaging and fill any gaps.
- Use your org's individual culture and brand to create something authentic. Not all things work for all places.
- Have a multi-year map of touchpoints and outreaches for each new donor who comes in. Including thank yous, engagement, re-solicitation, reactivation, etc.
 - Go beyond the first-time donor card and get specific.

A group of people in a meeting, overlaid with a blue tint and text. The text is centered and reads:

Idea:

*Create donor delight with
customized stewardship
contacts and leave a
lasting impression.*

Drive sustainable pipeline growth

Institutional commitment and discipline

- Get commitment and buy in on the plan from your team, your department, and institutional leadership for the long term.
 - Inconsistent execution of solicitation and engagement plans destroys momentum and risks feelings of confusion and alienation with your prospects and donors.
 - Protect your strategy from turnover, resource shifts, and other factors.
 - Don't become stale or stagnant, plan for evaluation and update as opposed as being reactionary to change.

A woman with glasses, wearing a business suit, is sitting at a desk with a laptop. She has her hand to her chin, appearing to be in deep thought or listening intently. The background is a blurred office setting with a large 'X' logo on a wall. The entire image has a blue tint.

Key Takeaway:

To succeed in acquisition
we must be prepared to
change, to commit, and to
get creative.

We Can Do This!

Thank You!

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