Nathan ([00:00:00](https://www.rev.com/transcript-editor/shared/3t0QUvhDBOeSvaOFDU_Y5mFUqTi05Zta21MqfskUIBK-hmgewGNId5anP9O5yQ5yWxyD5u5qEFNkiyBzJKEhwfsIHgQ?loadFrom=DocumentDeeplink&ts=0)):

Everyone, welcome to the webinar. I'm thankful. I'm grateful that you are here and choosing to spend roughly an hour with us today to talk about one of the most important things I think we can be talking about in our space at the moment. And honestly, we've been talking about for years and years. We'll unpack that a bit, but that topic is donor retention. How do we solve it? How do we fix it? How do we improve things? We're gonna, we're gonna unpack some of that today. I'm gonna give a couple of minutes here for folks to be able to join. I see the attendee count number just ticking up every second here. People are coming from lunch, people come, are coming from a, a meeting and all that stuff. So as people are joining, I would love it if you would open up the chat and let me know a couple of things.

([00:00:38](https://www.rev.com/transcript-editor/shared/v8G0OQaRp_fes3y6a2JIckLG1yLGgq-KEH86xgCiBaa8zWbRY7_4k1DoOmH5TwUWey8FPoDjXJygZ-jrkaNROAf_xYM?loadFrom=DocumentDeeplink&ts=38.94)):

Number one, what's your name? Number two, what organization are you from? And then three, where in the world are you zooming in from today? Again, your name, organization, and where in the world are you? I'd love to know that. So drop it in the chat. It's always exciting and fun to see how, how far reaching this cause and vision is of how do we grow, giving and generosity together. I see Riley here from next after Woo woo. We've also got Jonathan from Population Research Institute. Welcome Jay Parton from, oh, it Keeps Jumping Past Me. Look at that. From front Royal Virginia, we've got Dana from Kansas State University Foundation. Welcome, Dana. Glad you're here. We've got Pam from Keep Eler Count. Ooh, it's moving too fast for me. Keep Elber County beautiful. Elberton, Georgia. Welcome, welcome, welcome. We got lots of folks here.

([00:01:33](https://www.rev.com/transcript-editor/shared/fJ_HXJhxmmqX8DJz1BrtjQXqOiTSeLFfpnc6xzTav-Ng4G6Hjg5lcBqnLs_iAtwBXXQLtoeWb0yC5Er50AlJlzs-ao0?loadFrom=DocumentDeeplink&ts=93.3)):

Continue to drop in the chat there. Who you are, where you're from. Hi, Paul <laugh>. I see you. Shout that out. Paul Curry. Good to see you. We got several moody folks. That's awesome. Welcome, welcome. Grateful that you are, are here. All right, as people are still coming in there's a couple housekeeping keeping items that I want to go over. The first and foremost, and we talk about this every time, but it's coming up, the Nonprofit Innovation and Optimization Summit 2023 is coming September 19th through 21st here in Dallas, Texas. We got a full on game show theme. We've got tons of really fun events planned, so it's not an event that you're gonna wanna miss. It also has tons of great content. We're really focused in this event on trying to bring some innovation into our space.

([00:02:18](https://www.rev.com/transcript-editor/shared/SD3GsHR-HWFiKXUL3w3UYiTuNNitaPI2SIZgpXuTlDpW7vMYZgpVjqPxO6fon2jQhnpvp6Zj4GAtOGWEMxfBNzMy6pc?loadFrom=DocumentDeeplink&ts=138.6)):

I think a lot of the conferences that we, we, we often go to in the nonprofit world, you, you end up seeing sort of the same speakers from the last event in the last event, talking about kind of the same old stuff. We bring in a lot of, even for-profit marketers who have really innovative ideas that we think can be applied in the fundraising and nonprofit space. So a lot of the speakers that you're gonna see are people that you don't typically see on the nonprofit circuit, but have really helpful ideas based in data, based on research that we can put to the test to try to grow and giving. You see, see this quote on your screen from Marissa at Coral Reef Alliance she attended last year. She said, Neo obviously is a good time. It's not only been really valuable educationally, but it's also a ton of fun.

([00:02:58](https://www.rev.com/transcript-editor/shared/KYHTWrK4nqdHuau1ZDkf1FP3wUjqspA1XSHxaZgWpkngb0tco_NlfgGK6CMuy9uUo2NtdIqeZO3Gj6M3Sy0vBPx1loo?loadFrom=DocumentDeeplink&ts=178.57)):

I think we have like four interactive game shows even planned around the event hall in addition to all the great speakers and all that stuff. So it's gonna be a blast. Another quote here from Danielle Sparks, he attended the pre-summit workshop last year. He was in, in the workshop with myself and with Courtney Gaines talking all about how we can improve our messaging and our value proposition. And, and here's a quote from him. There was so much information that was applicable. It won't just change the way that we approach our donors, but our philosophy of why we're talking to them in the first place. So, yes, NIO is a ton of fun. There's great speakers. It's also gonna be challenging and, and to how you actually think about your communication with donors and, and why you're doing it in the first place.

([00:03:39](https://www.rev.com/transcript-editor/shared/GBRuWLEbwNuErfp_90F-Se4CQjQs6fRcBZH3ATA2EpPSY0F4u44Ir81Zyc84RjScIMqwKTle4MZ5ZypWAIrd6VPuDWo?loadFrom=DocumentDeeplink&ts=219.13)):

As says here I would love for you to join us. I'd love to see you in person, not just through the lens of a camera, through a webinar, but actually meet you face-to-face. So I'd love for you to join us. You can go to neos summit.com, that's niosummit.com to sign up, register, get your ticket and you can get $500 off your ticket through Monday. So talk to whoever you need to talk to today and tomorrow. Get approval to come, and then get your ticket before midnight on Monday to get that discount and lock that in. A couple webinar, webinar related items here. The most popular question that we get all the time is, is this webinar gonna be recorded and it is being recorded as we speak? So we'll have an email out to you either later this evening or tomorrow morning with all the info that you need, links to different resources, links to the slide deck for you to review the video recording so you can go share that.

([00:04:28](https://www.rev.com/transcript-editor/shared/luK_s6mIkuI7F6RhTtjcQlm43nkDGCvVWTFb17xeZ6YSZVY8gpf1O0gEga76Cs-2vpMbui03O_YkJxT-Dkv1Dtf6AI8?loadFrom=DocumentDeeplink&ts=268.04)):

You can go watch it back later. And then we should have some time emphasis, should have some time <laugh> for some q and a at the very end. If you've got thoughts and commentary and ideas and all that sort of stuff, just drop it in the chat as we go today. And if you've got questions that you want to make sure that we answer, use the q and a tool here in Zoom to drop your questions in. That's the easiest way for me to keep track of those at the end so they don't just get lost in all the comments and all that sort of stuff. So questions go on the q and a, thoughts, comments, ideas, drop 'em in the chat. Let's dive in. This is really what we're talking about today. We have released just earlier this week or maybe last week.

([00:05:06](https://www.rev.com/transcript-editor/shared/3voS-ahu-A9LyZaqaEfgNyBkWn5wcpAjf0OgKiGs4DLx9Lz7v2Ywbw4fcc16ONiNGpUXNE9B1b4eGjxwpc-4gpW9t4U?loadFrom=DocumentDeeplink&ts=306.7)):

I can't remember when we sent the email <laugh>. It's bit of it, it's been said out by shelf for a little bit as we've been working through this study. But it's called the Comprehensive Online Donor Retention Benchmark Report. We just wanted to keep it really simple and not a mouthful to say. So, just short and sweet. This is a series of research where we're trying to understand what are the key levers that are actually leading to improvements in growth in donor retention. So we're gonna unpack some of this today. You can scan this QR code to go grab a free copy of this report. But we're gonna look at sort of the high level findings from the first part of this research today. So all that said, let's dive in. And really, the first key question that you might be wondering, although if you're here, you probably already think it's important, but let's, let's spend a moment on this, this question.

([00:05:49](https://www.rev.com/transcript-editor/shared/NVFvX3erTUTdPRykbpjOa-RSqtYeyV3-BujPUvj5btXqNMcfqyXa_tRACqweK8YTM6yrzEiD54OvYZHNH7IhQYqIUi4?loadFrom=DocumentDeeplink&ts=349.54)):

Why focus on donor retention? Why is it important? Why is it absolutely critical for us to try to decode and figure out what's really working and what's not? Some of the latest benchmarks, this is from the new m and r benchmark reports that came out a few weeks ago, maybe a month ago at this point. And what they're finding is similar to what lots of other benchmark studies are finding about donor retention, which the short of it is donor retention is, is, is pretty bad. <Laugh>, there's so much room that we need to improve it and, and it's either stagnant or getting worse. What they found, just looking at 2022 data, the overall online one-time donor retention rate is 29%. So only 29% of those people will actually give to you again next year. It gets really bad when you're diving into new donors.

([00:06:36](https://www.rev.com/transcript-editor/shared/WRBUs3fL2k09yt2JdrPeKRVdQpLPUm0o21Z3QRuouEqI2AvoJ5pQo5RrbR1kxuv2rM85aDF7rHf8tE-3VQs8bOENDn4?loadFrom=DocumentDeeplink&ts=396.74)):

Specifically what, what, what they found through their dataset is that 16% of these new online donors retain only 16% will give to you again next year. You can't build a sustainable digital fundraising program or just fundraising program in general off of a 16% new donor retention rate. We just can't do it. We've gotta find ways to, to invest in these donors that they stick around for the long term. You know, as we were starting to explore this topic, you know, I haven't been in this space all that long. You can look at me and tell that, but for the, the entire time I've been in this nonprofit space, we've been talking about donor retention at every single event on most webinars, there's all sorts of blog posts. There's lots, lots of, you know, I, I'll I'll say experts, people that think they know what works <laugh> that, that are, are sharing lots of ideas that can try to improve retention.

([00:07:26](https://www.rev.com/transcript-editor/shared/X0cXXexBpEERvHrPrn6Rwg8SoSf2o4B3NeGb5b4OyG8-njiY_pYOn-ypa0cPSUzhx4aKd_cODZP5QrUnEnr_7PhIdBw?loadFrom=DocumentDeeplink&ts=446.9)):

We've been talking about it forever, and there's so many ideas out there, but I wanted to see, you know, how far back has this really been a problem? The furthest back I could find some really clear data points was from the Fundraising effectiveness project. And they have, have some data reporting back to, to 2005, or at that point, what they were finding was that for every hundred donors that were gained, 82 donors were being lost. So, at least as far back as 2005, retention has been an ongoing problem in our space, and no one has really cracked the code and actually solved it. So then the question is, how do you, how do you decode it? How do you really decode what works to improve donor retention? And so to unpack this, here's where I wanna start is talking a little bit about my, my grandma.

([00:08:10](https://www.rev.com/transcript-editor/shared/oz_8ejF9eVT_VzkAzHIVBKaQ92ApYgLF3pfsqZEjsj2aSctvVjygeYW--t5jXMh5dfwrFOt6qrdEpWpHTyexBYNAU64?loadFrom=DocumentDeeplink&ts=490.52)):

Kay, that's Grandma Kay. My grandpa Lou next to her in that, that photo, I'm tell you a little bit about her, and then we'll kind of unpack <laugh> how we're decoding donor retention as it relates to my, my grandma. So my grandma, wonderful woman. She is a second generation immigrant from Ireland. And so her father basically had, had come over, he had joined like the I r a at when he turned 18. And his mom, so my great-great-grandmother was concerned that he was gonna get himself blown up. And so she sent him to come move to the us which he did. And then he had my grandma. And that's how the, the, the, the Winslow family came to be in, in the us. She has a secret family that everyone loves. And so at every family gathering, basically people are hoping that she makes more of this recipe that we can go bring home and we can have for dinner.

([00:09:04](https://www.rev.com/transcript-editor/shared/4oN2eMeqIJLBNuxZNQTU4jWj2kxEYryG7OdJvwsjwIWFd7vyP6ZHuJRgiudIPMFegfXi9s0fvw6ebuFLAMl20WKuShU?loadFrom=DocumentDeeplink&ts=544.32)):

You would assume, probably stereotypically with her Irish background, that it's probably something that at least has potatoes in it, but probably like corn, beef and cabbage or something like that. But you might be surprised to find out that her secret family recipe that everyone adored was actually for spaghetti sauce and is the best. Like, I would request this, even as a kid knowing that I, like, I loved it, you know, if we're going to their house for Christmas, we request it. And then you, you go in her deep freezer in the basement, she's got these big, like gallon bags full of spaghetti sauce, all frozen for all the family members to take home. Everybody loved it. And then as I'm coming into my own as a, as an adult, and I'm doing more cooking and getting really into that, I wanna figure out how do I make grandma's secret spaghetti sauce recipe.

([00:09:44](https://www.rev.com/transcript-editor/shared/Kraly9lXqVYaNuQMH793KaWsuGik113NcZemX2CidKITEpxdhMLOwyko2hyKzDeaQbkCRo16IfHqMJiPxXbG8wnGepM?loadFrom=DocumentDeeplink&ts=584.43)):

So I, I finally got her to actually write down the recipe and, you know, you get all excited, like, I'm gonna be able to make this whenever I want it, and all that. She writes it down, and here's basically what the recipe card looks like. You've got all the kind of key ingredients you got on, you got garlic, you got crushed tomatoes, specifically crushed tomatoes from the can. You don't wanna use diced ones that gotta be crushed Italian sausage, but she wouldn't do ground Italian sausage. It's like whole links of spicy Italian sausage cut up into thirds. You got these big chunks in there. You bay leads oregano, kind of the essential stuff. What, what's disappointing after she wrote this down was that, well, she actually cooks exactly like I do, go figure. And where she doesn't measure anything, there's no real quantities.

([00:10:23](https://www.rev.com/transcript-editor/shared/Wbf_e_FunKJdXt8VtcI8a9hV2K8im4X40DKq2IC-JQfii2LXtcVng22AZ2U10vHoJpRIUMFFkVoCt0ZjB8AW7otE0h0?loadFrom=DocumentDeeplink&ts=623.55)):

We know kind of the key ingredients, but not how much of each thing actually goes into making the dish. And so on top of that, there's definitely no actual cooking instructions that go along with this. It's just, here's the things that end up going, you know, in the pot to make the actual meal. How it gets from here to there. We don't really know. It's, it's magic and it's love. I, there's also a, there's kind of like a secret ingredient. This is, this is the, the one thing that kind of jumps out, maybe not in the typical spaghetti sauce, was warchester sure sauce. So maybe this comes actually from her Irish background and that's why it's in there. But how much of this do you actually put in as like a tablespoon is the whole bottle? I don't know. You just gotta play with it and test it, test everything out and see what actually works.

([00:11:05](https://www.rev.com/transcript-editor/shared/PsOSTCJfhs-_CDw0KuI246eBVpGjOmpgOZUiQxOf1i-0fL3wog75itBHFN-KtgTMDxAzq8_8oOMB1PkUfDyt9Nr0d3E?loadFrom=DocumentDeeplink&ts=665.31)):

You know, in our, in our world, trying to really decode what works for growing donor retention, I think we're in a similar boat where there's a bunch of ingredients that I think we all can have some pretty good confidence are important. Like there's good data out there, specifically from Bloomerang on the importance of making thank you calls within 90 days, and the impact that that can have on the second gift rates and lifetime value and things like that. Obviously we need to have a meaningful cause that someone can see themselves investing in for the long term recurring donations. There's lots of data out there on the, the value of getting, building a recurring giving program for how long that those people stick around and their lifetime values. We want strong donor relationships that we're investing in. It's not just a one-time transaction, it's a relationship.

([00:11:49](https://www.rev.com/transcript-editor/shared/lN3kxoeP7Jd12NTS_HOjXj09EjOlgD6i2TYd4tWYbl3zzzyc0lSW-xQiDPwDWwXMm4eo-574zy436TQeh51KzEKYNkw?loadFrom=DocumentDeeplink&ts=709.83)):

We wanna have good technology to empower all the right strategies. We need to have good donor cultivation approaches and, and tactics to continue to keep people in in the loop and engaged and informed. But then, are these all the ingredients? I, I think we think they're right, but do we really know that they're right? And then how do you actually put them together in the right orders with the right donor segments at the right time, with the right messaging approaches, with the right creative, there's so many other variables to how you put these things together. And then maybe there is a secret ingredient that we don't know yet, <laugh>, what's the, the warchester sure sauce of, of donor retention. So there's a lot to learn. There's a lot to decode, even though we maybe have some of the key ingredients, how do we put 'em together?

([00:12:30](https://www.rev.com/transcript-editor/shared/TQZuXG9grLzQLeVGwIo9Vb7Vdf1sSJdO9Rp8mLHt6yjQszqXpKAhZUbtpdQGodMovxIDF4CbaT3s8orB4SVoLv-cY8c?loadFrom=DocumentDeeplink&ts=750.88)):

That's really what we're focused on here at, at next after, is we help nonprofits grow their digital fundraising. That's the one thing that we do. We're a research lab where we go out and we try to understand what's it like to be a donor and what's sort of the state of the industry where we conduct studies like these, trying to understand the full donor experience, putting ourselves in their shoes and looking at the donation process through different lens. We're a digital first agency where everything that we do in terms of, you know, email fundraising or advertising, et cetera, is rooted in ab testing and optimization where we're trying to see, you know, what are people doing out in the world through this mystery donor research, but then put the best ideas to the test to decode what actually works. And then we turn all of that into training materials to go equip you and as many non-profits as we can with what we're learning works to grow giving.

([00:13:17](https://www.rev.com/transcript-editor/shared/98SsxFdu3y8cDfNR4W_YCDEDdmEWLTPbCZugMicINRhz317PF_xsTJEisnNpqIb-U1SKdGWdo9nsFXWAQKL-zdVltIY?loadFrom=DocumentDeeplink&ts=797.53)):

And for, for today's topic, we're really drilling into this research lab side of things where we're trying to go look at the nonprofit space at large and understand, number one, what do donors experience? But number two, marrying that experience up with actual performance metrics as to how are nonprofits really truly performing in terms of donor retention. Our hope then is to overlay these two things to really draw some trends and see what, what are the commonalities of what's working to increase retention and then have the best ideas to go test. We partner with our friends at Virtuous to look at the donor retention performance data of 211 organizations. We've then looked at the full donor experience for these organizations, and again, trying to overlay these two things to see you know, what are the commonalities of high performing retention organizations to pull out the, the, the best possible strategies that we can put to the test.

([00:14:13](https://www.rev.com/transcript-editor/shared/uC3ALNio8I9cuJBrl1czQg5S4ViNHrboSTeSiaiIRckjBudStIeIOBuQ5GTLLLNXVwJ_vTgTgx01Qy6NwNYogKzLSGw?loadFrom=DocumentDeeplink&ts=853.06)):

So here's what this has looked like. Again, there's 211 organizations that we're currently studying. We're looking at donor retention KPIs, special things to our friends at Virtuous, and then we're looking at the full donation experience to see what does it feel like to be a donor to one of these high performing donor retention organizations, and also the low performers, and see what, what are the commonalities and trends and, and differences. All that said, it's a long introduction to get to, you know, let's really start with the essentials. There's some high level questions that we have started to ask about, you know, just organizations at large, what, are there any sort of like high level findings in terms of size or web traffic or, you know, recurring giving rates and things like that, that are sort of a, a smoking gun, if you will, as to what might be working to increase retention.

([00:14:59](https://www.rev.com/transcript-editor/shared/kw-K6BSb0twgwwoVQqLahkIJP_Y4t4FbvkFAzrYCuZ8zJJesrV9pZiGwQtSSsnUcEDADWqOIB-OSjRDvGUJeHdLcF9I?loadFrom=DocumentDeeplink&ts=899.06)):

So let's dive into our first question. Is retention simply just a function of size? It's an interesting question. There's a few different ways we can look at it. The way we've started to answer all these is we've taken all these 211 organizations, we've divided them into three equal groups, basically to look at the top third of high performing retention organizations, looking at overall retention rates, the middle group here, the mid performers, and then the bottom third of, of quote unquote low low performers. You can see the rough ranges there for these three groups. So we've divided them into these three categories, and then we're gonna go look at these categories across a bunch of different sort of key questions and key data points. The first being, how does revenue actually affect your likelihood of having good or bad donor retention? Now, with all these numbers, there's a lot of, there's a lot of variance that's going up.

([00:15:49](https://www.rev.com/transcript-editor/shared/5goAiRj7MYfGPthGpkFYPiCOA2PXYuPEn2Z6EH__N20JI8p5V0H2xHcf6SR7rltX_DXfCEQFidz-0cE5VJShfFV-PWA?loadFrom=DocumentDeeplink&ts=949.4)):

We won't unpack every single number in this whole, whole report and data set today, but here's one thing I wanna zero in on here. As revenue increases. So as organizations get larger and more resources, typically there are fewer low retention organizations. Well, you see on this chart, that yellow bar is gone. Those are the low performing organizations. There's no low performers in this like, very large organization category. And just as a trend, there are fewer low performers as resources increase. But it kind of begs this question, you know, which it's, it's the, which comes first, chicken or the egg kind of question, which comes first? Revenue or retention? Does high revenue and, and lots of resources empower organizations to put the strategies in place that lead to better retention? Or is it that they have better retention rates that is actually leading to them, them to hire revenue?

([00:16:37](https://www.rev.com/transcript-editor/shared/0t4JVJGFabVJ9dRxjZy1OLzyGUxMu_AgEZsXAM15sv0HlJYAdNY0q9igLD935PixgzzDZzHhpXzxC7cLY7yFZASucwM?loadFrom=DocumentDeeplink&ts=997.19)):

It's hard to really tease that out. So the other way we've looked at this in terms of size and volume is looking at, at web traffic. And again, there's a lot of variance and there's a lot of noise in the data, but here's the general trends on the average donor retention rate. For a small web traffic organization, the zero to 50,000 sessions per year is 55%. And as web traffic increases, you can see that retention is kind of coming down a little bit. The average retention rate for a 5 million plus in, in, in total web traffic per year is 45%. If we map every single one of these, and this is a big monster chart, I don't expect you to look at every single line here. The trend is that you know, retention starts to go down as web traffic starts to go up.

([00:17:22](https://www.rev.com/transcript-editor/shared/wi3dof0Lp_hwgV7AVol9mT5Mu9vWHCs4hyFUYW_Mcmh7x_h6Xo-oAPqPFBW_Vur7YVJqBjFIw-_tM5J1VK2X2m6S_H8?loadFrom=DocumentDeeplink&ts=1042.94)):

Now, it's not definitive. You can see there's lots of blue bars that are above the line. There's lots of blue bars that are below the line. So you can be a high performing organization with high traffic, you can be a high performing organization with low traffic and, and vice versa. So to come back to this question, is retention simply a function of size? Not really. There's opportunity for really any organization to have good retention rates, whether or not you have all the resources in the world, you have all the web traffic, or you've got no traffic and you've got minimal resources. There's, there's, it looks like there are still high performers kinda regardless of those categories. So then let's dive a little deeper. Let's look at vertical. So these kind of types of organizations, the different areas of impact that, that we work in.

([00:18:06](https://www.rev.com/transcript-editor/shared/zf0RroSsbqHZsi9BI0yhCuswITOLw2vVZQ7RrE2e8IleFFMAvs_XZUJsE0VainBqG2qFSUNnGTHmXjt2iZL_fEGfLAQ?loadFrom=DocumentDeeplink&ts=1086.44)):

Does retention vary by vertical? And as we broke this down, we tried to get a good sampling of all sort of the key major verticals I in our nonprofit industry at large with, with relative sizes and volumes inside of those e e each of those categories. As we're breaking this down by total donor retention rates or performance tiers, here's what we found the top performing. The highest performing verticals are faith-based organizations and these international organizations they're the top per, they have the most high performing retention organizations in those categories, which I think is interesting. We'll look at a couple commonalities here in a second. We compare this to the, the opposite side of the spectrum. The verticals that have the most low performers are health, public policy, and education. And just to kind of zoom back 30,000 feet to try to extrapolate, you know, what might be happening here why are some of these verticals more effective in terms of retention than others?

([00:19:05](https://www.rev.com/transcript-editor/shared/1t0jfG7gbHzzxNSjMriQYNpLztCJDlZ3WkQ6o2_YLUmuVbRMdgHqVZVkiYLmz-H0QPL3Th27TxK19bLUVxKxLRJmj8o?loadFrom=DocumentDeeplink&ts=1145.82)):

What seems to maybe potentially be happening? And these are testable hypotheses that these high performers in terms of the faith-based category, as well as these international organizations, tend to be pre values focused in their messaging. Oftentimes they're leading on strong core beliefs that they share with their ideal donor, and there's a focus on long-term impact, not just short-term need but, but, but a long-term focus and a long-term vision. Where on the other side of this is you have more like public policy kind of organization. A lot of that is really short-term. Oftentimes it's short-term fundraising focus. It's driven by current events or legislation that's coming today or coming tomorrow petitions and that sort of thing that has high urgency now, but maybe isn't focused on the long term impact. Some of these might have temporary affinity if I, in, in the health category, maybe I'm making a tribute donation because I had a loved one who just went through some sort of treatment related to a particular you know, disease or, or, or health crisis.

([00:20:07](https://www.rev.com/transcript-editor/shared/h-kox_5BJT7Qq6bqz-71-b3t4FWYGUBqQkkhjSHyX8QdxG_56BvYzYNyDWBZUw3hJPhyROjkTD_u8FxAejEJalhgIoY?loadFrom=DocumentDeeplink&ts=1207.98)):

But I might not be committed to donating to that organization for the long term. I'm making a tribute donation today because of my loved one who just went through this event. So there might be a shorter term focus for some of those low performing organizations. What I, what I, what I don't want to happen here is for you to look at, you know, a chart like this and say, well, yeah, we fall in the education vertical, or we fall in the public policy vertical, so we're just stuck with poor retention rates. What, what I hope this encourages you to think is, you know, what are those, what are those common traits of high performing organizations and how might I learn from that so that, you know, how do we become more long-term focused and values focused in our messaging, even though we're in the, the health category, we're in the public policy category, we're in the education category.

([00:20:50](https://www.rev.com/transcript-editor/shared/mXvLq1Lfxi2_hJeyqz5BqYP7JHbCIDjkJ_MerdrIAis51mB2RrJMY4r4scJ8O5L8zWFMaa0OnOtNktnnmi3F8rKJbBQ?loadFrom=DocumentDeeplink&ts=1250.5)):

How can we start to, to push the envelope a little bit, not be content with the status quo, but figure out what are those things that are actually gonna lead us to more long-term investment from, from donors? So back to our question, as retention vary by vertical heck, yeah, does we just now need to decode what are those specific things that are actually leading to those higher retention rates? Which leads us to really our next question and, and as we dove into this, this data, the potential Trump question that was looming the whole time is, you know, is, is donor re retention simply just a matter of building a strong recurring giving program? There's obviously so much data out there about the value of recurring donors and how long they retain and, and how valuable they are to an organization long term. You know, a lot of the world outside of the US figure that out a lot sooner than we did here in the States, but now a lot of recurring donor programs are getting a lot of traction these days.

([00:21:44](https://www.rev.com/transcript-editor/shared/9p0zZ_iZSncQapqcsYyTVMTrPdRBfIIlpEiL3NSgorfNcD-_Hn9diiM9LpnEKyAKBEWTJFGs-hL1NeJU6FBSZKD6iMU?loadFrom=DocumentDeeplink&ts=1304.8)):

It's a critical thing, it's an important thing, but is it everything? It's really what we're trying to understand at a high level as we look at these three different tiers of retention performance, what we're looking at in this chart is what percentage of their donor file is made up of recurring donors? And you can see that the trend is as you have higher percentage of your donor donor file being recurring donors, we, you see higher retention performance that's like the 30,000 foot view. If we stopped here, we might conclude that none of this other stuff matters about, you know, long-term focus of fundraising messaging and all that stuff. We just need to get more recurring donors. And it might get you somewhere, but it might not be the whole, the whole story because I wanted to compare these retention rates and these recurring donor rates to those verticals that we just saw that were kind of standout verticals.

([00:22:35](https://www.rev.com/transcript-editor/shared/Hn_s_xEB5VcRFbQBQZnSZDOBADZYW5BbdrOUHdLJ_zTjq0BMTaBM6K9IAsMAP6Pq1GoJ3gZdEm2W520nv0sKmF8dsWk?loadFrom=DocumentDeeplink&ts=1355.72)):

Retention might not quite be just simply based on recurring donors. And here's why. As we look at these different verticals that these different types of causes that organizations work in looking at the percentage of their donor files that are recurring donors, what we start to see is that just having a recurring giving program, or a lot of recurring donors might not be everything. These top four verticals have the highest percentage of recurring donors on their file. And what we see is a mix of results in terms of retention. There's high retention for these international organizations. There's mid-level retention here for arts and culture and humanities groups, and then you've got low retention for health and public policy. So it's not just about having more recurring donors, it's not, that's not the, the Trump card that sometimes we think it is, but it might actually be a combination of these two factors.

([00:23:27](https://www.rev.com/transcript-editor/shared/7hpYiYyYqDQpQz6efkti-nA65we36LBMLQvt_m1-O1wfKmXIvZ62za2z-37kt-DEM7kmGAk3ZQH5YYZAod014NMeoA8?loadFrom=DocumentDeeplink&ts=1407.37)):

Here's, here's my working recipe for high donor retention. Number one, I think we need values focused fundraising. What the data's starting to show us at this high level is that those organizations that are focused on the long-term impact are articulating why someone should give, not just now, but to invest for the long term in a cause combined with an emphasis on recurring donations and building a recurring giving program. Those two factors together might actually be part of this secret or part of the key to high donor retention. And I think it makes a lot of sense that these two things go hand in hand if you're talking about long-term impact and long-term focus in your fundraising messaging. Doesn't it just naturally lead to a conversation about becoming a recurring donor? If you're trying to get someone to invest for the long, long haul, why not sign up to given a monthly basis where you can make an impact every single month?

([00:24:21](https://www.rev.com/transcript-editor/shared/KaKe9DGBFHQaVED16OqC6axsSkXURblkICVcsu06ZypdPfqhEITnkB2jiRYqcaNdHV1SSOjipYXn_FcLAUqkh49rats?loadFrom=DocumentDeeplink&ts=1461.44)):

I think these two things go really naturally, hand in hand together. So what, what I wanna submit to you today, and we'll unpack this a little bit more in detail, but I would submit to you and I would hypothesize that maybe the most important ingredient in donor retention is really the answer to this. Why question, why should I give to you, not just now, but for the long haul? Why should I maybe become a recurring donor? What's really the impact that can be made meaningfully over time? And the way that we answer this question seems like it has a significant impact on someone's likelihood of retaining and staying around for the long haul. It sounds a lot like our, our core value proposition question. This is how we define the value proposition at next after it's the answer to this question, if I'm your ideal donor, why should I give to you rather than to some other organization or even at all?

([00:25:13](https://www.rev.com/transcript-editor/shared/VqJMAO7JOsa5Oepsk_5v0TYlUvTPcef3Pb2rbfMmw5xO6CAImRl9y7aFvvCYboFxtJ1WmUITn_D81WbLOLxckfVrzMo?loadFrom=DocumentDeeplink&ts=1513.46)):

And that's what we unpacked in the second half of the study is how are these organizations actually articulating their value proposition in the donation experience? When we look at value proposition, we typically look at four key elements. If you've been through any of our training and courses on, on value proposition, you've probably seen some of this. So we won't belabor the point, we'll go high level through this, but number one, appeal. How badly do I your ideal donor want to make this impact? Number two, can I get this somewhere else or can I make this impact somewhere else? Or can I only make this kind of impact through you and through your organization? Third is clarity. How quickly, how easily do I understand as your ideal donor, what are you communicating? Are you using clear language, avoiding things like jargon and insider terms, being clear about the impact?

([00:25:59](https://www.rev.com/transcript-editor/shared/8DUko6mKtkPBP1CpmMeCJrR8sVqrCueLV9UIQVmX3QJuYnBUIATxdekhqLZrq4I9nu3bfZUuXqIJbD_cud-IQiR6wvc?loadFrom=DocumentDeeplink&ts=1559.66)):

And then fourth is credibility. Do I believe you? Do I trust you? Do I trust what you're saying is actually true? So typically the value proposition is built on these four key elements. And so what we did next is try to understand as an industry, how are nonprofits doing in communicating their value proposition? If it's so important for the potential long-term retention rates of these, of these donors, how are we doing in communicating it? And there's a lot of different questions that we unpack in this report. I'll show you the link here again at the, at the very end where you can get the full report and dive deeper. We're gonna look at a few of the key questions that we asked along the way in terms of the value proposition. The very first thing when, when someone is going to give to your organization that they have to do is figure out where do I go if I show up on your homepage?

([00:26:46](https://www.rev.com/transcript-editor/shared/Nee0t1fSa0npF0v6qEJpfILp1SKqK_JxuRFSJJXxgVirm4nNO1wNJHaXNFRu5Hcmr3zi3MD06e1seR-Fq0jHTNQv14g?loadFrom=DocumentDeeplink&ts=1606.65)):

How do I get to even start the donation process? We don't all often look at the, the, the navigation process as the piece of the value proposition, but it, it does have a lot to do with clarity. How quickly and easily are we making it for donors to find where to actually make that gift, to make the impact that they care about? That's really the first question here. How easily can you find where to give? What's interesting here is how difficult it was for about a third of organizations that we're studying to actually just find the donate button. I'll show you a couple examples You can see on your screen up here at the top you can clearly see in the top right corner of the homepage right there in the navigation. It's this high contrast button jumps right out of the page, clear yellow button background against the, the, the image behind it jumps right outta the page, clear as day, you see it right away.

([00:27:38](https://www.rev.com/transcript-editor/shared/5-dnxhB5KlpZ20M61N7N8U4ZQjUD7FMdnF4i6DJbaCTfLci8SA_rsKIAFe84kN6iO2yKGusnO9lLVceZf_IiN4nB8pY?loadFrom=DocumentDeeplink&ts=1658.37)):

This bottom example, you kind of have to squint at it for a minute to find where the donate option is. It says give now, but it blends into the rest of the navigation. Uses the same text treatment as as home, as give now as about us as join our team as resources. They're all weighted the same. They're all treated the same, but doesn't jump right out of their page. It would be tempting to think, and it is tempting to think that, you know, if someone's motivated to give, they're gonna find where the give button is right. But experimentation, ab testing has shown us that even some of these small tweaks and changes can make a really big impact on the clarity of someone actually understanding where do I go to make a gift? So in this experiment this organization started with a navigation that looks like this.

([00:28:22](https://www.rev.com/transcript-editor/shared/JcOrA1qF_CqMIfuK1dNlgBftooUi5DM8nKZyPQaKWoJVbCJo17VxFakqW-Jvndyuf1EOL1onVvapDMkCk3CgOXoj07Y?loadFrom=DocumentDeeplink&ts=1702.44)):

You've got all the different navigation elements of the same weight, same text treatment you see donate on there on the far right far right edge of the navigation. They made one tweak here, they turned this donate link into a donate button. It now stands out in a purple button, high contrast against the background jumps right off the page. You see it right away. This actually led to 190% increase in donor conversion. So people actually showing up on the, on the homepage, clicking the button, making it through to the donation page, and giving a gift, 190% increase just by making that small little design tweak to add a touch more clarity to the process overall, as we're unpacking value proposition and clarity as it relates to donor retention, what we found is that, you know, this kind of one-off strategy of increasing clarity in the website navigation doesn't, you know, directly correlate to a massive increase in donor retention.

([00:29:16](https://www.rev.com/transcript-editor/shared/RK32qlqTcWn1U28OeMM6aYBWLLqi7NGKIZRzATKwxvuSrDzProzXTEoz_VRsaR84OUq1mVneSQ40Sbv5iELItNT01RU?loadFrom=DocumentDeeplink&ts=1756.65)):

But what we do know through this testing is that a lack of clarity can keep someone from giving in the first place. And if they don't give in the first place, they're never gonna retain cuz they never even started. So we have to increase clarity if we want to have even, even a fighting chance of having good retention because we have to start the relationship and start that starts with that first donation. Second key question wanna look at for, for a few moments here is this, is there value focused copy on the donation page? We're not looking at the quality of the copy yet. We're just looking to see are there words on the page that are doing something to articulate why I should give? And so the simple way that we are measuring this in one of these key questions that we asked in the process is do do these organizations, do these donation pages have at least four sentences of copy and you can see the examples there on the left clear stark difference version.

([00:30:10](https://www.rev.com/transcript-editor/shared/KzHrVAymVq00T43fkqPzBYT--luSRp3WdrxxSR5GbdjYOVUJYX_7K6pUuBffPeTe89VVvmvwvmNp64BzTwf7wj9BRTk?loadFrom=DocumentDeeplink&ts=1810.75)):

Well the, the one on the left here, far left has four plus sentences of copy explaining why you should give. It's got a couple different bullet points talking about key programs. The one there on the right has little to no copy. It's got a mailing address on there, basically a sentence talking about donating little to no copy explaining why someone should give. So this is just basically what we're looking for is, is there significant copy on the page talking about why you should donate? And what we found was that nearly two thirds of organizations have less than four sentences of copy on their donation page, which is shocking. We can't just assume that people are fully motivated to give when they show up on the page. We have to use clear language to help someone understand why they should actually give. All you have to do is look at your conversion rate on your donation page to understand that not everyone is fully motivated to give, you know, a good a good conversion rate.

([00:31:01](https://www.rev.com/transcript-editor/shared/5_JZxpx_PrEO_hA2o7wLwGWy_MvqJq3iGYfLY_Gz3FyGzqEwEHXsgrAVIagYqijtVhZvz_ZeHKE_YAXCBjjjKzJkiyU?loadFrom=DocumentDeeplink&ts=1861.75)):

I think the, the over overarching benchmark is about a 17% conversion rate on a main donation page. And even that's probably pretty high, which means we're failing 80 plus percent of the people that show up. Maybe we need more copy. This experiment shows how impactful even just a single sentence can be. Version A says you make Kelly's website possible. When you give to CaringBridge, you ensure that her private protected place to share health updates and connect with community of support will always be here. That's basically two sentences, a headline and then a lengthy sentence. Version B here adds an additional headline. So we're not even at that four sentence mark yet, but now it says this website helps Kate stay connected to family and friends. It's increasing the clarity of where your gift is actually going and not, not just functionally what it's doing in terms of keeping the websites active, but also why it's matter, why it matters, why it's impactful.

([00:31:55](https://www.rev.com/transcript-editor/shared/dRmeik2oFFek-G7CoIeQYC-srlnh_oCcPay5HhpoNPfhRuqJsQ2z-VAI3bfJhvUiF5C9Hfs9lqVcxhqOTE79iYoJCJg?loadFrom=DocumentDeeplink&ts=1915.94)):

It's helping Kate stay connected to family and friends. This additional sentence increased the strength of the value proposition, even just a little bit and led to a 21% increase in donor conversion. The total number of people actually giving on the page just by adding one sentence. So overall, what we're finding in terms of the total volume of copy, you know, these one-off tactics around just increasing copy on the page, maybe they don't directly correlate to long-term retention just like we saw on the navigation, but donation page copy can greatly improve performance right there at the point of of conversion, which is obviously gonna help when people are considering donating for, for the first time or coming back to give for the second time, or maybe it's their 10th gift or it's their hundredth gift. This type of copy on the page helps someone get over the hump to actually understand where their gift is going, why it matters, why it's impactful, and actually choose to to be generous.

([00:32:49](https://www.rev.com/transcript-editor/shared/9OVilV4GcIhaGHvPRe50qUVpLgmAnrdNfksu8rhhPMqcf4CYCSI-OvtPP8K0RDRohF4fvPdWEX1vkue4SAxWH4xsa0Q?loadFrom=DocumentDeeplink&ts=1969.61)):

So we need this value focused copy to help lead degraded conversions. And if we can do that, that should improve retention rates because more people are willing to convert. The next key question is, is now moving from just, is there copy on the page to what's the quality of the copy on the page? How strong is the value proposition copy? I wanna show you a couple of experiments real quick before we look at some of the scores just to show you how important the value proposition is overall on these main donation pages. This organization started with basically a headline and a single sentence of copy. Illinois's comeback story starts here together. We're writing the next chapter of Illinois's comeback story. Version B has a ton of copy on the page. It's not just a couple of sentences, it's not just four sentences. There's 1, 2, 3, 4, at least four paragraphs of copy here on this page.

([00:33:44](https://www.rev.com/transcript-editor/shared/0bET5k5kKaOJIw0Jp12k446fYwUhZwmObvkIkBmdiwKvMMGAvqyoVmDf-EWiEgfl5rccu1zBJ3nbCqwicRAWFsXhkSE?loadFrom=DocumentDeeplink&ts=2024.72)):

Unpacking, what's the problem? What's the potential solution and what does your donation, what impact does your donation actually make? It leads to a clear call to action. It fully answers this question of why would I, why should I give to you rather than some other organization or even at all? And it led to 150% increase in donor conversion. This is not just a one-off experiment. We see this many, many times over and over. This organization has a single headline on the page, version B unpacks Why someone should give with significant copy. There's two sentence headline, you've got a couple paragraphs of copy, you've got four different bullet bullet points talking about some of the key initiatives from this organization, unpacking why someone should give and significant copy led to 116% increase in donations. So as we're going through the donation experience through this research, our researchers are asking some key questions around each of these key elements.

([00:34:40](https://www.rev.com/transcript-editor/shared/CKfWlW4tErDL9sJGJpuzQqVGwVd0l2uuY8YoY2j2I-aJiVYPrAvEVhRQf34X0aaaq5T73u9KVpooD3xmLPQaYdkuj7Q?loadFrom=DocumentDeeplink&ts=2080.88)):

Again, how badly do I the ideal donor want to make this sort of impact? We're scoring this on a scale of one to three a one being like, I don't have any of these kind of shared values. I don't really care about this problem or this cause I'm not interested. That would be a one, A three being I wake up in the morning passionate about making this kind of an impact. I'm all in. So we're doing our best to score this from the perspective of the ideal donor to these organizations. Exclusivity, can I make this impact only here or can I make it somewhere else? We're looking for language that sometimes you might call invisible language, like give hope. It doesn't really mean anything and almost any organization could put give hope on their donation page justifiably, but it doesn't give you any sort of differentiation as to how am I uniquely able to give hope and to, to what people?

([00:35:29](https://www.rev.com/transcript-editor/shared/ZDIaU6IIz4q8m10sR-VDij72LGKsdFJ-KFxnRaZ1_JUN2eDDIWL9lIYmw8dAfmthrlujOSJkzXM94_0RFzsa-tV2yh4?loadFrom=DocumentDeeplink&ts=2129.06)):

To who to what. We wanna lean into exclusivity. Can I make this impact anywhere else or can I only make this impact here? Clarity being the third one. How quickly, how easily do I understand the words on this page? Again, scoring on a scale of one to three, a one being like, it takes me some time to really think about it. Maybe there's some confusing language in there. A three being it's clear language, I instantly understand it. You're not using insider terms or jargon that most people wouldn't understand without deeper context. It's an instant understanding. And then credibility, again, scale of one to three. One being, you know, these organizations haven't gone out of their way at all to try to boost trust on the page. A three being, you know, maybe there's some testimonials on the page or there's some sort of third party credibility indicators like a charity navigator seal or a guide Star Seal.

([00:36:17](https://www.rev.com/transcript-editor/shared/gxHmihgzmXeFlepfyK8iYenRk4MGFqZLyfXyGMXmcR_A6jq3cwyWR4ezP_B2a0-zSxqC-b-Cgz1lOUTYa17YICyQ_G8?loadFrom=DocumentDeeplink&ts=2177.97)):

Any of these sort of third party ways to get someone else to say yes, you can trust this organization. Could be a review, could be a quote or a testimonial. So we're scoring all these organizations across these four key elements on a scale of one to three. And here's what we have overall. The average overall value proposition score was 1.7 outta three. So it's like right, right in the middle, not great, not horrible, somewhere right in the middle. Meaning there's a lot of opportunity to improve as you look at the scores across each of these different categories. And we can see the highest performing category was clarity at a 1.9 outta three. So overall as an, as a nonprofit industry, we're better at being clear than we are about actually talking about the cause in an, in an appealing way, which is kind of interesting or leaning more into clarity than actually what the gift is going towards in terms of impacting the cause.

([00:37:11](https://www.rev.com/transcript-editor/shared/jgfWX98T8eVqfs-vkvX0zGD7BTjwWJPyVa1TDp77i2Fzs8RYcJK9_ur81QrafYMkceH3zXil3a_62eOgU-ImDKgPg1E?loadFrom=DocumentDeeplink&ts=2231.49)):

Credibility is the lowest here. Credibility had the worst scores on average. So very few organizations are going out of their way on the donation page to help boost trust again, through something like a testimonial review quote, et cetera. We're just maybe leaning on, on brand trust, hoping that people that show up to consider giving already know who we are and already trust us for one reason or another. We're not trying to boost credibility actively overall. Here's what we're finding. Every organization, regardless of your size, regardless of which vertical, which kind of cause you serve, has a tremendous opportunity to improve the strength of your value proposition. This might be one of the most important things that you can invest in. Invest in, not just for conversion now and getting more people to donate on your main donation page or in your next campaign, but for the potential long-term impact of these donors sticking around, how do we communicate why someone should give, not just for now, but also for the future.

([00:38:09](https://www.rev.com/transcript-editor/shared/g0tlXtXZ32pHvg4Kz-knz3jTStffPhzQZYDcD7N2qusuxFHDzvAcsxSa57IZsdkw-EahP3YxSMLG4HFc2y7j88nUxPo?loadFrom=DocumentDeeplink&ts=2289.12)):

What's the long-term impact? Now I'd be remiss if I didn't give you some really practical things that you can consider. There's a lot of like kind of high level ideas that we've looked at so far things to think about, things to have conversations about, to dive deeper in the actual study. But I want to give you some really practical things that you can do as well. So this is how we'll wrap up our time together. I'm gonna look at a few experiment examples of practical tests that you can run to improve your value. The first experiment, the first common experiment I'd encourage you to consider. Many of you have a donation page that looks like this very minimal copy. I know this because we're looking at the data in this, in this study two thirds having less than four sentences on their page.

([00:38:54](https://www.rev.com/transcript-editor/shared/PUgV_zZw7jMeWTyaSYpMsKbxHAKJbVh2q7Sbv2qA0Gg3BaoKc4Jw6GRO6haBgcX1xOcnfoyW9k8njQCmvOPjQMeQk44?loadFrom=DocumentDeeplink&ts=2334.49)):

I would encourage you to run something like this, what we call the nothing to something test where you have virtually no copy on your page. I would simply test adding some copy on the page, not being afraid of having a lengthy page, adding some copy on your page that starts to answer this question, why should I give to you rather than to some other organization Or even at all dialing in your value proposition can be really tricky, especially on a main donation page when there's a wide variety of motivations of people that are coming to this page typically to give to you some care about this program that you have others care about this program over here and don't even know about this one over here. So we have to be sort of all encompassing in our copy on a main donation page. But still unpacking what's the problem, what's the solution?

([00:39:38](https://www.rev.com/transcript-editor/shared/LSe4ZDZ7tjPn7BhZPTWjIReVcPkwZ1C06tzqYljgdXAL2Xhkbgapm_ynMMHGsgdtqBT3rE_BuJqkGxGV2NYdvWAnjTA?loadFrom=DocumentDeeplink&ts=2378.98)):

What's the impact that a donor can make? Giving some examples of different initiatives and programs that you have to make and impact on the cause. This has everything to do really with addressing the value proposition at large, but really the appeal. How badly does someone want to give to writing the next chapter of Illinois's comeback story versus this longer form unpacking of, of really the core appeal, the core value proposition. Again, this led to a major increase and conversions. If your page looks like this, I'd encourage you. Top priority coming out of this session today is consider running an experiment on your donation page that unpacks your value proposition. And then starting to test that messaging over time to really dial it in. Comment, experiment number two. Some of you, this might be shocking, but I would encourage you to use text and not a video on your donation page in order to communicate with clarity.

([00:40:31](https://www.rev.com/transcript-editor/shared/tGMvOuCbtO6HsQlMuktQ3MP5NwXZIzhjKPDCrx_U_wwfbc6NELJJImMRee-yKf9_21eSAlD_Ckt3hNTNVejNAia2g7E?loadFrom=DocumentDeeplink&ts=2431.69)):

Here's an example version a here main donation page has a video unpacking why someone should give. It's a great video, highly produced, very high quality. But they wondered, you know, what if we took the core message that's in this video and just put it in copy on the page. Now you can see there's a lot of copy on this page. It's unpacking that same value proposition message, but just putting it in a different medium text. What this led to was a 527% increase in donations. And again, this is not just a one-off experiment. We've seen the same type of result even at this 500% increase level multiple times. In fact, we've never seen video on a page outperform text on one of these donation pages. It has everything in my view to do with clarity and how quickly someone can process the information.

([00:41:23](https://www.rev.com/transcript-editor/shared/8bteBW6dcBJM5ww1Ocxj1dXH6VKc0VtJrOKHWUn7afySAKGa5rVENCNcd0E7e3gjpGk8p-fSZ3e3oKYHfYTTHoCBpio?loadFrom=DocumentDeeplink&ts=2483.89)):

You know, if I'm on version A here and I, I click play on the video, I then kind of lean back and I sit back and then I have to, I'm gonna go watch a three minute plus video about why I give. That takes a lot of time to sort of digest all that information and I'm just sort of passively listening rather than version B where I'm actively engaged in reading the copy. I can scan it, I can go back, I can paint my own picture in my mind almost like reading a story as to what the impact looks like, which makes it even more personal to me. And it leads to this increase in giving. So this might be a test to run on your page. If you have a videos, just take the core concepts in the video, unpack them in text on the page and run that experiment.

([00:42:06](https://www.rev.com/transcript-editor/shared/S9SyXiHXIBqh4yrd03zSFZvqD9vZBBKyeVf5fL9xdrvITN0FZGubEiED7Fwe0Bf2g_tkkchvtIQak5DWchEEHRfembo?loadFrom=DocumentDeeplink&ts=2526.71)):

And then third, common experiment. Number three, value proposition doesn't just apply on a donation page. It applies in every conversation we have. It's actually all encompassing of how someone interacts with their organizations. I'd encourage you to run this test to actually email like a human being. Your emails design can have a significant impact on how someone perceives your message and how trustworthy you are as well. Here's one example, version A here. Looks like a typical email wrapper. You've got logos and donate buttons at the top. You've got a big hero image. You've got this progress bar cuz they're in the middle of a campaign showing you how close they are to the goal. And then you got copy, we've got a big donate now button below. You've got an image of the sender, you've got all these different design elements packed into the control.

([00:42:53](https://www.rev.com/transcript-editor/shared/eoMYmU3azgGYcrWv15i9pUSmgi9rcX2eGw2VdzwoBy4p_Qd2J44sPLP-LvYc8vOdJ7pJRi9Az92BrKll3Zv0d8FAfus?loadFrom=DocumentDeeplink&ts=2573.54)):

Version B has the same exact copy. It even still has a little bit of that design wrapper, but it removes most of those design elements. This led to a 29% increase in donations. And consistently what we see across all of our experimentation, which is 5,000 plus experiments at this point, is that leaning into this more humanized approach to email fundraising. And email communication does a couple of things. It gets better placement in the inbox because there's not as much H T M L and all that stuff for the email to load. Gmail is gonna go look at and say this looks more like something sent from a human being. So I'm gonna have, I'm gonna put it be more likely to put it in the primary inbox as opposed to the updates or promotions tab. But also as a recipient of these emails, your potential donors on the other end that we often say, you know, people give to people not to email machines if they see version A, it looks like marketing and maybe I have my guard up a little bit knowing you're just trying to get me to do something.

([00:43:50](https://www.rev.com/transcript-editor/shared/F3NoSwZeysRzd9CKyvO2hbUDKRzFH5Wagglfmyo0NUq5_P87sL6yVHUi99Stb2kBQ2Q7wQ7TzOsU-upqFxRYLTnbhPU?loadFrom=DocumentDeeplink&ts=2630.82)):

It looks like marketing or version B, something that's a bit more plain textile looks like a authentic email that you or I might send each other directly out of Gmail, which just bodes bodes well for building more trust. Litmus has done some interesting survey work in film that the first thing that people typically look at when considering opening an email is who's it from and do I trust them? So if it's sent from a person and then it looks like a human humanized email, I'm more likely to trust it and you might see better results. So you can run this test too. If you send a lot of design emails, simply send something from a person in a plain text style, keep the copy the same, but just remove those design wraps. It might lead to this kind of an increase for you.

([00:44:34](https://www.rev.com/transcript-editor/shared/XqxhuYTz9f9-UPAh0vf14wLRRjX2pcbYY1uKY6pmkMKogU19an_iPfw6gBg-dOMRBGBFFsa-TSPEat53rPmgzyA6E9Y?loadFrom=DocumentDeeplink&ts=2674.08)):

Here's where I wanna land and where I want to end is kind of, excuse me, filling out our recipe card here cuz we've, we've talked about a bunch of different areas upfront. We talked about values focused fundraising and using messaging that's focused on the long-term impact. We talked about the importance of building a strong recurring giving program. I think these are two really important ingredients in donor retention. We talked about clarity in the giving process. We need to make it clear how to get from point A to point B when someone's considering giving a gift. We need copy on the page. We can't assume that everyone is fully motivated to give just because they show up. We need strong copy on the page, not just words, but really good ones that help lead someone to actually be inspired to give and to part with their money, which is a tall order.

([00:45:20](https://www.rev.com/transcript-editor/shared/p34WpiqGn6C7501HjiVjjE9DBEAl3UCbZ6cax5MKoCPzdzA8QOQ3f6220iUtIVtU3IlVgUZ5jOatVjmH3VGjPmNxofI?loadFrom=DocumentDeeplink&ts=2720.58)):

And then maybe there's still some secret ingredient that that, that we don't know. As, as i I, as I think back on, you know, my relationship with my, my grandma and my relationship with the spaghetti sauce that she made. That was amazing. You know, as I, as I think back on that, you know, we're as I'm still trying to decode, you know, how do you really make, make that sauce in the right way? I still wonder, is there a secret ingredient that I'm missing? I see that tablespoon of warchester shire's sauce. That's, that's part of the secret for sure. There's also, I think a de a deeper level secret in this, which is part of the reason, and maybe you've experienced this too, if you've got a, a family recipe for a, for a pie or for a cake or for a sauce or for whatever it is, it's just no matter how close you get it, it's never quite the same when you make it yourself as opposed to, you know, eating it after the person that you loved and adored made it for you.

([00:46:11](https://www.rev.com/transcript-editor/shared/GbsSn48p0ekk_0Kwt2YCF_8mwT1CevmE7w-7YkdCFOSO5C4ooekyYxvxuPzg13h2ZWD-smV3Enlax43o0Rpuf7FmFI8?loadFrom=DocumentDeeplink&ts=2771.94)):

There's something special about that because so much of the the the deliciousness is actually baked up in, in some of the nostalgia. It's baked up in the, the investment that my grandma would put into making the sauce because she loved her kids and she loved her grandkids and she wanted to share that with them. She's actively investing in them by making this something as simple as spaghetti sauce. I think there's a lesson for us to learn here too, that oftentimes we're just searching for the next tool for the next the next cool shiny new thing, new strategy that we can go roll out and hopefully it's gonna magically fix retention. It's really easy for <laugh>, I sneak Joe commenting on my pronunciation here. Thank you. It's, it's really easy for us to go out and and justify budgets for things like acquisition because the math is easier.

([00:47:00](https://www.rev.com/transcript-editor/shared/3p60qIFm_faG3b_-vVX0Z_EhlPuXlDDfKLOUUol25E6MUDfO2CmqtX2wYyDkXJPg8RnPuLl1gFppH2H4ZrpTGqCmuqw?loadFrom=DocumentDeeplink&ts=2820)):

Looking at dollars that are going out versus dollars coming in from from, from new donors. What's really hard is to put the level of intention and investment into really figuring out what's going to lead to this long-term engagement from donors. But I think if we can put the investment of both our time and our budgets toward trying to solve this together, we can get there. We've just gotta put the work in and give it the right love and attention and investment. And we're gonna decode this thing. We're gonna it out. If you wanna dive deeper and look at more of kinda what we unpacked in the first part of this study related to value proposition and donor retention, you can go ahead and scan this QR code here to go get a copy of the study, get it for free and download it.

([00:47:42](https://www.rev.com/transcript-editor/shared/Tx74FXqiPOEmq56t6FaPLAoSDiNAfS4p5_RtAdMEYc5MPT3DUCThwBgnJyXVrczKmiX1Bukh926ybsdwU-FIBvTljkE?loadFrom=DocumentDeeplink&ts=2862.49)):

You'll get a nice PDF that you can look at. And then we will actually have it copies of this thing printed out for you at the NIO Summit. So if you wanna, if you, you join us here in Dallas in a couple of months here, we'll make sure that you can get a copy of that, a paper copy of it as well. So make sure that you don't miss this to go to niosummit.com. I'll make sure you get your ticket. You can save 500 bucks if you get your ticket before at the end of the day on Monday, and we hope to see you there in person. We've got a few minutes. It's 1 48 my time here, which means we've got 12 minutes till the top of the hour. Is it the top or the bottom? I never know till the next hour till two o'clock. So we've got a little bit of time for some questions. I'm gonna go ahead and, and pause my screen share here. I'll pull up our q and a tool. Riley, I know you're kind of in the background there. Are there any questions that have come up that we should start with as I'm pulling up my q and a tool? Anything that you see?

Nancy ([00:48:38](https://www.rev.com/transcript-editor/shared/edwjV1mfs7ladwaq4wV9-rnOUQoGMcnOH_1Y08nZa5oqUHEC4b6XEGs00o6CEHktCNUs2DouV47f9kTML5q0igqd3kw?loadFrom=DocumentDeeplink&ts=2918.08)):

Yeah, I think Nancy had an interesting question early on. She had asked why would retention rates decrease as web traffic increases?

Nathan ([00:48:48](https://www.rev.com/transcript-editor/shared/r00PLUrNUdXmVUJujLJ9o0RaGJmNLifEGs7b4GFpyFMVS-uGWbU4sRGNCAkJwHCbbJQfkxRaGFwK7H24KUeWUi9_KBo?loadFrom=DocumentDeeplink&ts=2928.25)):

That's a great, that's a great question. Thanks for teeing that up. Riley. Nancy, I love the question and it's a really, it is a, I think it's an interesting one. I think it has a lot to do. There's probably a couple factors. When we look at even things like conversion rates compared to web traffic, oftentimes what we see is overall, you know, if you have high web traffic, you tend to have lower conversion rates compared to a smaller web traffic organization. So some of these lower web traffic organizations typically are more in their infancy or they're more localized, which means the people that are showing up tend to just have a higher investment in the organization or in the cause where when you get to that larger size, a lot of times the traffic that's coming in is from like news and blogs and articles that have mass reach, but those people showing up might not always be as motivated to give as sort of that core group that's been around from the beginning.

([00:49:41](https://www.rev.com/transcript-editor/shared/ptgsJcUHKANzVIQjuSJtwfoXGYHbU5JlgO_KXQ09e2m1R5vr9nKcP9tnX8PqbESl-s5dBaJKCkdM_zPJmfmrb50UjOA?loadFrom=DocumentDeeplink&ts=2981.32)):

So that might be one reason why we see a slight decrease in retention as web traffic grows. That's my, that's my working hypothesis there. It's a good question. I see Beverly has to go. Thank you for being here and thank you for the encouragement. I appreciate it. I see a question from, from Ken here. Any data that looks through child sponsorship lens, if not a separate category, where might those types of organizations reside in your existing categories? We definitely have at least a couple of those in the dataset. They would likely fall, I'd have to go double check. Some of those fall in the faith-based category. Some of them fall in the international category. It depends on kind of just what their primary selection is through their nine 90 information as that, as that gets categorized and and logged.

([00:50:27](https://www.rev.com/transcript-editor/shared/IkLu9K6qwn-rKRXmHKReAjcGKdEhn5jjcKggslw0XsyKb49I1mnW7meNJZSEr4TX-OvbV1Jag0MdUhtcj-iEg28nNsI?loadFrom=DocumentDeeplink&ts=3027.14)):

So they would fall probably one of those two categories. But you raise a good point about child sponsorship organizations. They typically have a a focus on recurring giving. And so some of those organizations would be moving that retention needle in a significant way, especially if they're focused on that long-term impact for the child or for the family or for the area that you're making an impact on. And it's building on a recurring giving program on a recurring basis. So again, we're seeing those two kind of key ingredients at work to lead to those retention rates. Focus on recurring giving as well as a focus on long-term investment and long-term impact. It's a great point.

([00:51:05](https://www.rev.com/transcript-editor/shared/80GoG7Uep4zNJzWSzcrTLXX0o_XPN0ZU5zU6u2NLM6AqBRlrP9X9wRlmwRTcPKr0-pRN5zVasmUeLhKJad7AD1YAqSs?loadFrom=DocumentDeeplink&ts=3065.3)):

I don't love to answer questions from anonymous attendees. If you, if you ask this next question on preferring to keep copy on the dona donation page, short, put your name on that question and then I'll answer it. Love to see who you are. We got a question from Mary. Shouldn't they offer monthly giving on the donation page two, you, there's a lot of ways that you can try to grow recurring giving. In fact, we've seen an interesting series of experiments lately just putting you know, typically you have the donate button there in the top right corner of your navigation. We've seen a handful of times now putting a recurring donate button right next to it. So you've got sort of this contextual one-time gift versus monthly gift options right there in the navigation oftentimes is leading to greater overall conversions cuz you're giving someone a choice and you're giving them additional context.

([00:51:51](https://www.rev.com/transcript-editor/shared/XfeSH78hKrLdSbtFG3OMRC3c6Y11RBtADcUOJie0lgbvf2cpbcPf_MhwK17R3jhPyQXBb2XkRj7n4JYv0qM9VcpZVtg?loadFrom=DocumentDeeplink&ts=3111.11)):

Yes, I would have monthly giving as an option on the donation page two, but you also should think through how are you crafting your copy in a way that leads someone to want to give a monthly gift. We've got lots of experimentation in our library showing how, you know, you might get some recurring donations if you just simply asked for them. But what's the value proposition around giving on the monthly basis versus just a one-time gift? Are there additional incentives? What's the additional impact that can be made? So you might consider that in your copy, not just asking for a monthly gift, but why should I make a recurring monthly gift rather than a one-time gift or even give at all and kind of reshape that value, value proposition question. Let's see, Anthony, what are some effective recurring giving programs you've seen? I'll throw that child sponsorship example back out there too.

([00:52:39](https://www.rev.com/transcript-editor/shared/JGycNjOq4ON0ZgLrNmuAlm2ODPVMRcTpr6AjwvIIC97hyWQ9QQh5evH9zgQngPjrnCknU3gByUzBC96cuv6zDc3I7R8?loadFrom=DocumentDeeplink&ts=3159.77)):

That was brought up I think by, by Ken. That's a really interesting sort of lens to look at. One example that would be like Compassion International where almost all they're giving is focused on building this recurring donors around sponsoring a child. I think, you know, you might not have that specific application, which makes sense, but thinking through that lens of how do I position a donation appeal in a way that helps someone see the, the impact of making an investment for the long term, not just impacting something today, but what are those shared and core beliefs and core values that we want to see make a change in the world? And leaning into those to make your recurring donation ask. Anthony sometimes just starting that recurring giving engine or giving program just simply with making a direct donation appeal to ask someone to become a recurring donor.

([00:53:29](https://www.rev.com/transcript-editor/shared/K5_ahHw5zOTqekkZvfYMaqUPiZBBhrKCV_D41Y8JG1ysp9jnvUDBo4rqbW8lVu5HtnpyQO378qrt4rvOt3oAuzZW6yI?loadFrom=DocumentDeeplink&ts=3209.64)):

It's shocking sometimes as you look at the communication, we, we put these options on a donation page that gives someone the chance to become a recurring donor, but we never go out and ask 'em. So just taking that first step of actually making a dedicated ask and then you can go build that into your new donor welcome series as well. Once someone gives a one-time gift, follow up with them after you cultivate them a little bit, maybe a few weeks later within that first month you ask them to upgrade to become a recurring donor. There's some interesting data to look at how quickly someone's willing to give a second gift or upgrade to a recurring gift. Yes, lots of those people will do it at at the next year. That's typically because that's when we ask for those things. But maybe if we adjusted our communication, we can actually get these people to upgrade sooner because lots organically do anyway. So it's just putting the intentionality and the investment into building some of those strategies into our programs and then testing and optimizing to see what's really gonna work to get, get the most bang for our buck and for our, our investment.

([00:54:26](https://www.rev.com/transcript-editor/shared/d7TnIKnFdfbFbKAxPVJHDT6-J9S9SEbwjqxvx6NcAA38HWYGhxmcjvQlpoqLuDWqv6H_5AYhGPufleX_rFNYnXFY52M?loadFrom=DocumentDeeplink&ts=3266.64)):

Okay, we're on a roll. This is a long one. Bear with me with a question from Adam. There's a big shift to moving online donation platforms to very simple pop-up style UX that moves people through two to three easy steps. These don't allow much room for text. The theory being it reduces friction, increases conversions. Your text focus approach on a one page format varies from many of the other major platforms like fundraise up, classy, et cetera. Do you think that approach is still superior? It's a great, it's a great question. This has become the norm in our space in the past couple of years, maybe three or four years, where more and more and more you're seeing those little giving widgets pop up is like really the only or the primary way to give. We've tested those multiple times and we certainly wanna get more experimentation and more data around it.

([00:55:13](https://www.rev.com/transcript-editor/shared/hyBbbeh_jwSUQqCTA86iC3tvdnk3SzbGswk7l0kqEu0qASKytgbt4N3pb9YCC8ArVwu1M2RK6wnEBbHQlibPc0z-ghs?loadFrom=DocumentDeeplink&ts=3313.35)):

I've yet to see a, a popup like that outperform a single page donation experience where you have the clear copy value proposition copy in the format that we've looked at a few times in today's session. I've yet to see that multi-step widget really outperform the single page donation experience. And I think it's for the reasons that you're pointing out, yes, that might reduce friction if you will, but it doesn't often give you the space to answer those key questions that a donor is likely asking as they're considering giving a gift or assuming motivation when you don't have any copy in those little widgets. But a single, like a, a longer form single page donation experience gives you the room to answer those questions that are most critical for a donor who's, who's really wondering, you know, what kind of impact can I actually make? Do I trust you? Is it clear where my gift is going? You can't unpack that stuff in just a single sentence and a little popup. We need a little bit more space. Adam, it's also something that you can put to the test. I'd highly encourage you to test it. Don't just trust what the donation platform tells you. Cuz they don't know your audience, they don't know your donors, they don't know your specific situation, but you can put it to the test and let your donors tell you through the data what's actually most effective.

([00:56:28](https://www.rev.com/transcript-editor/shared/f6bnQnqf_n-iZWYFOU7FaO-JXQSLIohIOmHo-glQ1m43WpqBPdJBjEqF1_UC3B-OlAhEFhq-5XFHDVOExo4MOtbBvlA?loadFrom=DocumentDeeplink&ts=3388.42)):

Chris was asking, can you explain vertical? I don't quite understand vertical is, is is really just a, a term to talk about, which kind of cause does an organization fall into? Are they higher education might be a vertical. Faith-Based organizations might be a vertical environment and, and animal welfare might be a, might be a vertical. So you can see those throughout the report and you'll see those kind of key ga key categories. It just means what's the, the, the cause categorically that a group of organizations works inside of. Let's see. We've got a question from Isabel. How would saying, how, how would say portraying a sense of urgency within the appeal and clarity is helpful or harmful with retention? I think I understand this question and forgive me if I, if I kind of, if I miss it here, you can ask it again if I, I I don't get it quite right.

([00:57:17](https://www.rev.com/transcript-editor/shared/g3pXx2dzt27sgakDatWO49qeZvCSAATY9yAO_VtCvmeiBNfLHYlOLihjkWfYu29uK0ofz2lTxjt--UuhQj2NNWxx_Js?loadFrom=DocumentDeeplink&ts=3437.32)):

This is actually a conversation we were having last week a little bit, talking about, you know, what's the difference between, you know, fear and urgency can be be a really powerful motivator to get someone to give now, but is fear in high urgency the most, the best way to get someone to give for the long term? We're talking with our friend Mallory Erickson last week. She was talking about the potential of using hope rooted language <laugh> in our appeals to get someone to give for the, potentially for the long term, but there might be a blend. Can you use high urgency to get someone in the front door and use more long-term hope focused language and follow up appeals to get them to see the impact of giving over time? These are things that we need to put to the test and that we can test.

([00:58:01](https://www.rev.com/transcript-editor/shared/y5pWaSUgt5uF8EJpt_auAR3b1kqzMO7HurVDr_zkve8gRF55Y4Of_w0ji-4Acb-zh6XOi3TS-_4uCNgbgdxaVsT4QqI?loadFrom=DocumentDeeplink&ts=3481.27)):

We just have to build some longer term experimentation around. So hopefully more to come on that front. We've got two more minutes, which means we probably have time for one, maybe two more questions. David is asking, digging into the data about value proposition, did you see any difference amongst high retention organizations and better performance and value proposition? What's interesting as we started to look at the data you know, there's a lot of variants in in the data because you've got, you certainly have outliers and people that can have high retention performance, but not great value proposition and, and vice, vice versa. That is what's interesting is these kind of one-off tactics. If you're just looking at one specific page and one tactic on one page, it's hard to draw that as a clear correlation to, you know, multi-year donor retention.

([00:58:49](https://www.rev.com/transcript-editor/shared/HR8H2UhXfPFXkAPaCzLNS2emlBCS2yWmM7euNoZTvjP4zZW5myFifhm790juHY-YKV8IVE50waRpuvqRyjgWQ7LHT2o?loadFrom=DocumentDeeplink&ts=3529.96)):

And so we weren't able to draw some of those cl those clear conclusions. But what we are able to see is that those things are really important for conversion now, right? When someone is at that point of considering giving and go with me here, but hypothetically, if you can increase conversion rates in a significant way across your various channels, then that should lead to better retention as well as you're sending those new donors back to a donation page in an additional appeal in a couple of months. In your next year end campaign or high urgency campaign, you're boosting conversion rates overall, which should lead to more second gifts and third gifts and fourth gifts. But it's a long-term measurement and it's a long-term experiment.

([00:59:30](https://www.rev.com/transcript-editor/shared/lZV1qHmHwu4ZEj3bwfhJKBfYTdQnEaMju7OTXDsl1iIXS4HBvkmEiELvc4ykB6ZBVjRKzU0WfVb506f0AUhxKoLYyoc?loadFrom=DocumentDeeplink&ts=3570.8)):

Joe, any thoughts on getting nonprofits to embrace the changes needed to adopt these ideas? That's a, that's a big, it's a big question. I, and I certainly, I don't want to pretend that I have the answer. You know, continually more and more I think people are a are asking these questions and there's more of an appetite as you see things like, you know, often we can spend a lot of money on acquisition, but we continue to see acquisition costs go up as, as you know, Facebook and Apple and these different platforms have their own sort of fighting between each other and privacy regulations just makes it more expensive to go reach more of the right people. So it it, that might harm our acquisition budgets. Which leads us then to ask this next question, well, if we can't just fix or build our program by pouring more into acquisition, maybe we can move the needle even just a little bit on retention to fix some revenue issues and actually start to see growth.

([01:00:23](https://www.rev.com/transcript-editor/shared/VZkb6JcMw1LTX_j-AiLPMXaH-PvVO9bIOOoKRF0Q3L3yacJnVCnCvow_o6gszmvo__DdorPKKIQ7IjgMZS0GDJh9d48?loadFrom=DocumentDeeplink&ts=3623.84)):

So I don't know exactly what the answer is, but I would encourage you and, and, and all of us today to lean into the data, lean into what the data is telling us, lean into testing and optimization, mitigate some risk that way. Test your way incrementally to some wins to build some some buy-in from key players and leaders in your organization to run maybe some of these longer, larger experiments that might move the needle on, on retention. It's 2 0 1, so we're a minute past, past the top here. Thank you for these great questions. There's more that we didn't get to. Feel free to shoot me an email if you'd like to continue the conversation. I'm really grateful for you spending an hour plus with me today. And I really hope this research report is really helpful for you even just to, to spur on the conversation internally about how do we make the intentional investments in our donors or that we got big resources or small resources that are gonna lead to that long-term impact. So thank you all so much. Hopefully this is helpful. We'll send you links to the report and all of that stuff in an email shortly. Appreciate you, we're rooting for you here at next after, and we'll see you on the next webinar. Take care y'all.