

NIO
NextAfter's 9TH ANNUAL
NONPROFIT INNOVATION
& OPTIMIZATION
SUMMIT
2024
GENEROSITY JONES
and the HOLY GRAIL OF FUNDRAISING
WITH TITLE SPONSOR iDonate

SESSION NOTES

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SESSION NOTES

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Higher-Powered Text Messaging

CREATE
POWERFUL
CONNECTIONS
WITH YOUR
AUDIENCE



- ✓ Best in-Class Customer Care
- ✓ Two-Decades of Industry Experience
- ✓ Proven Texting Strategies for Nonprofits

Text PBT to 77007 to learn more!



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INTRO TO NIO SUMMIT

SPEAKER: Tim Kachuriak : Next After

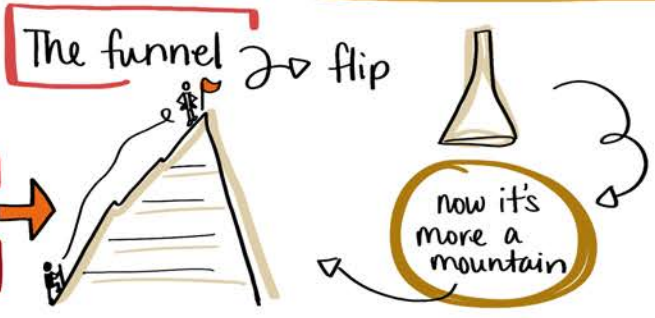


Why did you choose NIO?
↳ such an important question.

NIO is about learning in a fun way!

We want you to take all you learn back to make the most change & impact.

How did YOU make your decision?
- intuition - best practices - gut



We live at the top of the mountain

Optimizing Each Micro-Yes (micro-decisions)

↳ our perspective is different from the donor

LOWER A ROPE
give a value proposition
• With a lot of value!

ONE SMALL CHANGE CAN MAKE A BIG IMPACT!

Reframing the value prop. & testing it can show the right areas to change.

EXPERIMENT!

from a donor perspective

TO CHANGE

① We must see the world differently.

- ▷ Donor-centric emails & communication
- ▷ Think from the donor perspective - what do they see?
↳ Give them a value, a reason to give.
- people read what interests them.
- ▷ EMPATHY is important
↳ donate to your org & pay attention

HELP THE DONOR ON THEIR JOURNEY!

② We must listen better.

- ▷ Pay attention to the "NO" metrics!
- ▷ the unopened emails tell us a lot
- ▷ The sender makes a difference, subject line & preview too
- ▷ Make it personal!
- ▷ Listen to donors - they tell us insights!

③ We must pay attention to our language. OUR SPEECH

- ▷ Compassion seems to be hard wired in all of us.
 - ▷ Oxytocin - bonding/compassion chemical in us. → 80% more generous!
↳ how to get the Oxytocin flowing?
- ★ Tell Better Stories! STORIES

SEE, LISTEN, SPEAK BETTER!
from the donor perspective

BUILDING A LEARNING ORGANIZATION

Why "business as usual" is actually your riskiest move

SPEAKER: Jenny Magic : Build Better Change



Indiana Jones was always a hero in over his head. → **COURAGE & CURIOSITY** carried him through

- ### Pitfalls of Uncertainty
- ① Avoidance (the ostrich) "Wait & see"
 - ② Fixation: Anxious fixating (panic button)

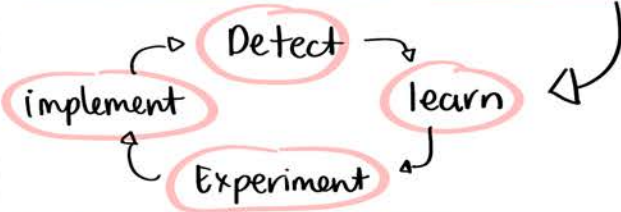
Change saturation
- change exceeds capacity →

Collapse in support

WE NEED A CULTURE OF LEARNING

Teams are struggling!

"You can buy compliance but not willingness"



- Some challenges:
- Defend blame panic
 - fail to apply, repeat mistakes
 - Over complicate, hoard knowledge

BUILDING THE PERFECT TEAM - Psychological Safety

"I can bring all my ideas & thoughts to the team without fear."

- ① - Open Communication - expressing concerns & issues → with safety, not fear
- ② - Inclusivity - ensure all perspectives are represented, all members can share → options for quieter, introverted members
- ③ - Willingness to Help - truly are all in this together, collaborative
- ④ - Accept Risk & Failure - failure is seen as necessary for growth & innovation →



EVERYTHING IS AN EXPERIMENT

Thoughtful Experiments will give the best information.

When these are present - teams work better
- team members feel better

- ### Change Journey
- ① - Catalyst
 - ② - Capacity
 - ③ - Commitment
 - ④ - Collaboration
 - ⑤ - Calibration
 - ⑥ - Calculation

- Agree on the Problem & write it down
- Assess Change readiness
- Get the right people on the bus

- Let them fly! together!
~ clear purpose & principles
- Share visibly - Be transparent!
~ be open! ~ share tasks!
- Incentivize Behaviors - motivations & reward structure
- Listen to Understand - hear concerns & feedback

TAKE ACTION: what will you do?

Quick Tip:

FUNDRAISING vs. TRUSTRAISING™

Josh Bloomfield with Givecloud



STOP fundraising!

What if with our obsession with data & best practices we are stopping our fundraising?

What if we focus on THE DONORS & their connection to our cause!

have we forgotten the experience of giving?

What if our donation pages were a gift to the donors. Focus on the heart.

A Delighted Donor -

gives faster, gives more, gives frequently & SPREAD THE WORD

TRUSTRAISING is donor focused!

Donors are 3.5x more likely to donate with more interactive components that are non-committal.

1. Keep form clean & simple.

2. Get out of donors' way.

3. Leverage micro-commitments.

Be a TRUST RAISER!

delighted donors become devoted donors!

THE MAGIC OF MESSAGE

How to talk less, say more, and connect with anyone

SPEAKER: Brian Miller : Clarity Up Consulting



Every trick could be described in 1 sentence.

if people don't know how to talk about what you do, THEY WILL NOT TALK ABOUT WHAT YOU DO.

Current climate	
TRUST	Noise
↓	↑
down	up

We can see the marble elephant in our heads, but we hand people a block of marble

we need to hand them the elephant!

How to answer the world's worst question: "What do you do?" WITH A CLEAR CORE MESSAGE

★ The Best ideas don't win - The CLEAREST ideas win!

Present solutions to real problems. — For AUDIENCE to ACTION so that IMPACT.

MAKE A Filter statement → 1 sentence, on emails, etc.
- Does blank fit our filter statement

THINK ABOUT

AUDIENCE
★ be specific

ACTION
★ be specific

IMPACT
★ aspirational

? "What do you do?"
i So you know how "PROBLEM"? Well, I'm a "TITLE". "FILTER STATEMENT"

→ THE FORMULA → Memorize your answer. ★

||| USE YOUR FILTER STATEMENT to filter all communication! |||

JUST SAY THE THING!



FUNDRAISING NUGGETS
 The 8th Wonder of the World
 and its impact on your mission
 GREG COLUNGA · NextAfter



Compound interest is the 8th wonder of the world, he who understands it earns it, he who doesn't pays it." - Einstein

DRIP - dividend reinvestment plan → Compound your returns

IN FUNDRAISING... the mindset shift must be made

- \$ spend
- \$ Revenue
- \$ Donors
- \$ ROI



Lifetime Value increases in a truly crazy way!

by reinvesting: donors increase
 ✨ → by 3x potentially!

We are seeing consistent results!

DRIP

THE PSYCHOLOGY OF DISAPPOINTMENT

How it affects your donors, Why it's bad for your organization, & What you can do about it

SPEAKER: Michael Aagaard: CRO Consultant



Order sea monkeys - you get tiny shrimp.

lie & cheating marketing

Disappointment has big impact on behavior.

Disappointment is the gap between expectation and reality.

Bigger the gap the bigger the Disappointment.

EXPECTATION GAP



Survey about disappointing experiences online

feelings

- frustrated
- angry
- disappointed
- annoyed

subsequent behavior

- never again
- still upset
- avoid brand

all felt the expectation gap

Among donors

- ✗ lack of acknowledgement
- ✗ Poor communication/follow up
- ✗ lack of transparency
- ✗ excessive donation requests

Expectation + Experience = SATISFACTION

Expectation Measurement

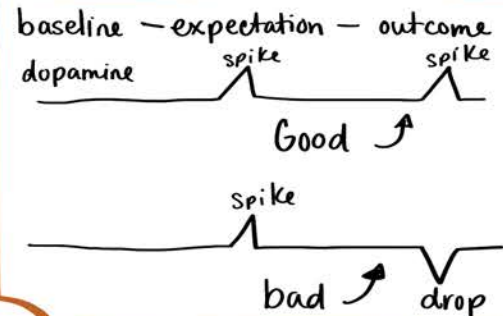
↳ pre-test (expectation)

post-test (experience)

how do you think this will go?
scale 1-5

how did this go?
scale 1-5

we at least want these to be either better in post test or the same.



A tangible neurochemical event

↳ Disappointment

Disappointment - Aversion

we feel disappointment more intensely & actively avoid it.

- So afraid of disappointment that you don't even try.
- Always asking "will I be disappointed?"

How do we make sure our donors will not be disappointed?

Disappointment leads to DISTRUST.

Establish an Expectation Baseline

- Donor interview/surveys

- ↳ What do you expect when donating? What could make you feel good about donating?

Service recovery Paradox - exceed expectations when disappointment occurs go above and beyond expectations

MIND THE EXPECTATION GAP

~ disappointment is a conversation Killer

Quick Tip:

THE BIGGEST LESSONS ON OPTIMIZATION FROM SILICONE VALLEY'S GROWTH ERA

Jonathan Beck with WeGive



We are in our growth hacking era!

What is growth? what is the whole cycle of customers?

PIPE-LINE (funnel)

Awareness
Acquisition
Activation
Retention
Revenue
Referral

Non-profits sell meaning!
Donors are our customers.

① The best tests orbited around profit-market fit.
↳ or Mission-Market fit



② What did the losers do wrong? - focused on the wrong vectors

Retention is Key for non-profits!

③ Winners made painful data-based pivots



What needs to change from what we have learned?
- Then change it!

EMPOWERING NONPROFITS WITH AI CONTENT ENGINES

Building Strategies for 2024
SPEAKER: Ross Simmonds: Foundation



Media influences all of us. → AI is now having a massive impact!

We've all been lied to from bubblegum to car dome lights.

another lie...
AI written content will never work.
challenge your beliefs & embrace experiences!

CNET → AI content many errors occurred!

They apologized, supposedly.

turns out... for CNET...
AI content was a huge hit & made a ton of money - crazy.

★ AI is doing to white-collar jobs what robotics did to blue-collar jobs.

- Do you think AI will eventually take your job?
- How to navigate the chaos?

Embrace content growth framework
• Research • Create • Distribute • optimize •

AI for research - upload file & ask AI to create reports
↳ Use it like an assistant!
• Analyze Moz reports, etc.

Creation → ^{USE} AI

- ▷ Ask questions about what AI created.
 - is it accurate? - is it original?
- ▷ Reverse engineer
 - high editorial standards - *a human must do this!*
 - reads like a human post
 - multimedia content
 - internal linking
 - EEAT Authorship practices
 - elements of disclosure
- ▷ Create content that educates, engages, entertains, empowers.
Elevate with AI content!

AI can help ideate at scale & write at scale
Then elevate content.

Midjourney AI - to create imagery!

Distribute with AI - use old content for distribution in other platforms

- ▷ old blogs, articles, videos for socials
- ▷ ask AI to create more posts in same "voice" & "tone"
 - Chat GPT → canva → midjourney
 - ↳ tons of new posts!

Optimize AI - BY HAND

- link reader for SEO
- take what AI does & finish it by hand

➤ Leverage AI for your organization! ➤



FUNDRAISING NUGGETS

Conquering the Temple of Fear

Pushing your organization to greater heights with testing.
YANNI SARATIS - NextAfter



TEST

Sometimes it will surprise you!

Homepage takeover

- ▶ turn homepage into a donation page for x amount of time for x amount of traffic

This can seriously increase giving!

TEST · TEST · TEST

If it works, continue!
If it doesn't test more.

increase time
1/2 amount of traffic
↳ find the sweet spot

REASONS TO TEST:

- learn something new
- break down silos with data
- try something new
- see if you gain/lose something

**PUSH
PAST
FEARS**

and experiment!

EVERYTHING IS CONNECTED

SPEAKER: Kara Logan Berlin: Harvest



Do you know why you are doing what you are doing? - is it intentional?

Intentionality:

fundraising & development are different.

fundraising is NOW

development is longer term

Purposeful action drives sustainable results.

Intentional work succeeds.

Core pillars

1. Understanding donors
2. patience to build relationships
3. collaboration & integrated strategy

- Collaborate, break silos
- work together
- think holistically.

Finding your donors - ABCs

Ability to give
Belief in your cause
Connection to someone in your organization

individual must have all 3

Individuals are the only ones who give their own money.

Essential Questions

- Philanthropic motivation
- How they give?
- Connection to us
- Donor interests

Why do donors give?

Corporate partners, foundation funders, & individual donors all look different & have different revenue streams.

Strategic Relationship building

Discover → Cultivate → Brief → Solicit → Steward

the more you get to know them you will be able to assess the right gift or service

ASK the right amount, time, & thing.
& STAY CONNECTED

BE INTENTIONAL AT EACH STAGE.

Prioritize consistent & personalized engagement.

- donor should be talking 80% of the meeting
- then you can be intentional for them

Silo mentality undermines Success

Starts from the top.

- teams working in isolation miss opportunities

Customize for different donor segments

BREAK SILOS

Unified vision, safe feedback spaces, cross-department interaction, broaden employee perspectives.

1 gift goes through multiple teams showing effective team collaboration.

- trust & empower each other
- Be transparent
- follow through / follow up
- Share
- Celebrate

DO IT DIFFERENTLY.

SPEAKER: Trovon Williams: NAACP



We can get caught up with how 'I feel', when the message isn't for us.

Growth requires change!

- Who are YOU talking to?
- What are YOU talking about?
- Why are YOU talking?

Who are you talking to?

~ communicate for them

~ make it matter to them

Know your audience

TARGET AUDIENCE is incredibly important

↳ Are you messaging the right people with the right message.

? Are you using the right mechanisms?

↳ Like Heatmap to know what's right

• Who am I trying to speak to?

• What do I want to say?

make your message resonate with TARGET AUDIENCE

identify your target audience

& change to target them

What are you talking about?

~ core message identifies the value proposition

message discipline

↳ messages that resonate appropriately

▷ Get outside perspectives

▷ validate assumptions

▷ Test to erase doubts

~ if it doesn't resonate - CHANGE IT!

Why are YOU talking?

~ What are you offering that is different?

Knowing your audience

• What is unique?

• What separates you?

Lean into the uniqueness.

? Are you resonating with your audience in a different, stand out way?

★ Make your message personalized.

↳ build loyalty → Go beyond the transaction!

Why is your brand different?

- A brand is a destination, a promise, a personality

• Develop content discipline

• unique narrative

• Use your name, logo, URL to strengthen brand identity.

Do what you HAVE to do, so you can do what you WANT to do.

Quick
Tip:

3 OPTIMIZATIONS PROVEN TO DRIVE MONTHLY GIVING ON YOUR WEBSITE

Nacho Andrade with iDonate



WHEN IN DOUBT TEST IT OUT!

a few suggestions for testing...

- 1 Add a 2nd call to action.
- 2 Use a tabbed layout on donation page.
- 3 Ask for recurring donation before processing donation.

When in doubt...

TEST IT OUT!

DONOR RETENTION

The surprisingly simple strategy to improve your most critical metric

SPEAKER: Nathan Hill : NextAfter



44.5% → RETENTION industry average → actually, year after year it is going down.

- Google AI has some suggestions
- Thank donors - in a meaningful way
 - Be personal - communicate on a human level
 - Be transparent - so they know & trust you

most of us are doing these things.

maybe time for something new

MAP OUT A PLAN.

Some research shows → 1 in 4 orgs did not send an immediate receipt - in 7 days

33% did not cultivate in the 1st 90 days of donating

51% did not send a thank you in 7 days

51% no attempt to ask for 2nd gift within 90 days of donating

DOES THIS REALLY MATTER?

make or update your... **New donor welcome series** → make it look more human, less newsletter

- ↳ Sent by an actual person
- ↳ simplify the content
- ↳ more authentic!

LEVERAGE content offers

- passive cultivation - newsletters
- active cultivation - downloads

↳ send cultivation with no ask - separate them

ASK people to do **ONE** thing at a time → Don't overload people!

- ↳ Communicate like an authentic **HUMAN**
- include reply back emails in email plan

DOES THIS IMPACT RETENTION?
We think so, but would like more data!

Brad at NextAfter created "Friday Fun with numbers" → big question - what makes a donor not come back

1 gift in Year 1 - 21% retention → 2+ gifts in year 1 - 45% retention

By year 2 - become a key multi-year donor!

- | | |
|---|---|
| High Retention Orgs. | Low retention |
| <ul style="list-style-type: none"> ↳ more emails from real humans ↳ eliminate extra call to actions ↳ send more active cultivation | <ul style="list-style-type: none"> ↳ rarely ask donor to hit reply |

PEOPLE GIVE TO PEOPLE they know & trust.

Treat donors like humans you want to get to know!

ELEVATING FUNDRAISING WITH AI

Faster, Smarter, Joyful Strategies
SPEAKER: Kishshana Palmer : ManagementMint Inc.



Many of us are overwhelmed, exhausted from running in 6th gear!

How to slow down to focus on your purpose.

TODAY IS THE DAY your life changes!

AI can add fun to your work!

Join the AI REVOLUTION!

Your nonprofit's new BFF. Super charging your impact.

You have to teach AI to "think" like you.

Then AI can help with all kinds of things.

Strategy and much more. So you can do your mission.

AI 101: allows us to search faster, how to find supporters & donors

Allows you to simplify your work so you can innovate & move toward your goal.

Make sure you ask realistic questions so AI will answer more accurately.

Perplexity - tool that links to the sources in the format you want.
- uses real time data

People currently care about comfort & escape.

Ask AI to make your mission using the language of the times
- comfort & escape

ACTIVATE
AMPLIFY
ACCELERATE
OUR MISSION

Use AI to personalize your messaging.

Bring out the old content & use AI to enhance & reuse that content.

AI can help time your Outreach

AI can help streamline operations

YOUR WORK SHOULD BRING joy

Allow AI to automate the "boring" stuff

Implementing AI

Start small
• test it out

Utilize AI to make data management slicker & easier to read.

Our documents should bring joy & show personality.

Keep it ethical - go over it with human eyes

Rediscover the JOY in fundraising!

Stay flexible

↳ you can change it

BRING LEVITY TO YOUR WORK & DAY.

Quick Tip:

DARE TO GO OFF COURSE

Shake up your regular routine to raise more for your cause

Danielle McGruder with DonorPerfect



Are you stuck in a rut?

Same events, same strategy, etc.

Sometimes routines are good, sometimes they keep us stuck.

Going off trail...

1. Adds more variety
2. Encourages opportunity to evaluate
3. Check our footing

Discover - root of problems, evaluate practices

- ▶ Ask donors, ask supporters
- ▶ research what's effective

Realign - realign your team

Ideate - what can we do differently to engage more - get creative

- ▶ swap teams, swap papers

Value - where do we put our ideas, assign value to each cup - low effort, high impact

Execute - choose wisely

TO GET FUNDING ~ Be Fundable and Findable!

SPEAKER: Kevin L. Brown: Mighty Ally



Donor rejection stories
~ we all have them!

It is common to stall in fundraising.

↳ especially smaller nonprofits

1 in 1,000 nonprofits will grow more than a small business.

What's the solution to the non profit starvation cycle?

Fundable & findable means more funding.

BRAND 1st
Funding 2nd

HOW TO BE FUNDABLE

- **Law #1** A pitch without a problem is a problem — donors need to know the why, the problem **LEAD WITH THE PROBLEM!**
- **Law #2** Complicated missions complicate funding — mission statements have lost their way
- lack of clarity → mixed messages **FOCUS ON MISSION CLARITY**
- **Law #3** Sell donors on your vision, not just cause — visions are weak & mixed with mission statements



USE AUDACIOUS GOALS & VISION!

★ One sentence theory of change: Show donors WHY you exist, WHAT you do, WHERE you're going, WHO will do it, HOW to get there, & WHEN it will be done.

HOW TO BE FINDABLE

- **Law #1** Difference = donations → EMPHASIZE it. Different beats better. Better is subjective.
- people are wired for comparisons **How are you different?**
- What are others NOT doing?
- **Law #2** Diversified funding is a nonprofit nemesis. helps early, but not with growth
- large nonprofits: 90% funding is 1 type — more funders in a primary source
- Pick priority audience (3 max)
- **Law #3** Brands that chase all channels, chase away funding.
- omni-channel myth — 10-slide deck, 5 page website, 3 line elevator pitch, monthly email newsletter
START HERE

★ One sentence - Unlike COMPETITORS we are THREE UNIQUES we reach ONE AUDIENCE via TWO CHANNELS in order to ONE GOAL.

HOW TO CREATE A WEBSITE PEOPLE (actually) WANT TO SUPPORT AND DONATE TO

SPEAKER: Talia Wolf: Getuplift



- CRO process is easy... Right?
- 1 find leak in the funnel
 - 2 create new variation
 - 3 launch experiment

"Create new variation" is the hard part.
do we look at others?
do we guess?

It's not about changing elements on a page.

It is about solving people's PROBLEMS.

WE ARE SELLING TO PEOPLE.

Understand why people choose you.

↳ why people make decisions!

(Decisions are made by emotions.)

EMOTIONAL RESONANCE

~ not manipulation ~ true connection! ~ it's about them

2 STEPS...

STEP 1 Uncover emotions & motivations

- ▷ **Self image** - how do people feel about themselves after taking action
- ▷ **Social image** - how do people want others to feel about them
- ▷ **Run meaningful customer research**
 - are they ready? what's their stage of awareness
 - who they are, why they are buying → SURVEYS
 - Conduct social listening - review mining
- ▷ **top challenges, main concerns, top emotional outcomes, words/stories donors use** ← **KNOW THIS**

STEP 2 Audit your websites from an emotional resonance lens - NOW CRO IS SIMPLER

- ▷ **audit funnel** - strategically → what's the why, emotional outcome, etc.
- Here is what your audience gets, what's in it for them. ← it's not about YOU!
- ▷ **Put emotional resonance in your messaging.** - incorporate trust, social/self-image, connection
- ▷ **Tell audience/donors what they have done!** ▷ make it personal & accessible ← share the data

EMOTION-CENTRIC FORMULA: "Feature" + desired outcome = emotional-centric copy

- ▷ **Emotional resonance in Design** - amplify message, make it about the donor, use social image
- leverage emotional design - telling a story to send people down the right path

Good Donor Cultivation - we know the bad

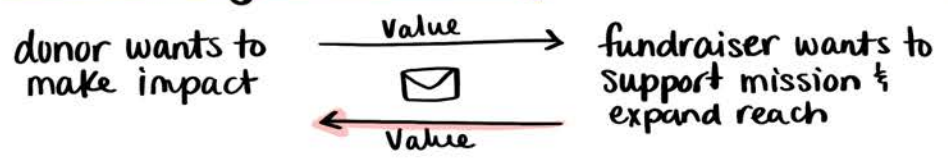
Email Treatment: outlook style, relational, aligned beliefs, provide value

• What is cultivation? $\frac{1}{2}$ role on donor loop

- creates positive, emotional connection with authentic, human communication

Picture someone in your mind write to them

• Fundraising donor loop



★ Communication must provide value to donor

Stewardship, Topics of interest, relational!

<p>Reasons we fail cultivation</p>	<p>No immediate ROI Prioritize brand Always ASK Forget how real people talk</p>
------------------------------------	--

• measure it: USE Reply-rate TO MEASURE.
 ↳ ASK FOR THE REPLY.

• Reward: more mid-level / major donors, more revenue, more engagement

Send 2 pure cultivations/month, send from real person, ask for reply once a quarter

WHY CAN'T WE BE FRIENDS

How to end the endless battle between Marketing & Fundraising

SPEAKER: Jeff Giddens: NextAfter



Marketing & Fundraising - continued battle → 2 hypotheses as to why

1 Nonprofits have difficulty defining the customer!

Non profit organizations say they aren't a business. → They are! both have: budgets, revenue, mission, employees, but businesses have customers, nonprofits have ?

Donors & recipients sometimes are the same & donor/recipient alignment

donor recipient

Donor/recipient overlap

Donor/recipient separation

So who is the customer? donor? recipient? volunteer?

2 Not everyone is comfortable asking for money!

- can cause turf wars. → everyone loses!
- marketers are accused of just wanting clicks, sign ups, etc. → top of the funnel
- fundraisers are accused of just manipulative asks → bottom of the funnel



Situation #1
Top of funnel paradise

- no big deal its just impressions

focused on impressions

- we need awareness & MORE

Situation #2
Clicks to nowhere

Traffic
impressions

Situation #3
Lead gens prison

prospects
Traffic
impressions

END THE BATTLE :

- Clearly define your customer
 - donor • recipient • volunteer • all
- Define where the line should be.

Where will your org draw line for accountability & clarity?
- Chain your KPIs together
 - how much traffic from impressions?
 - how much traffic became prospects?
 - how many prospects became donors?

Bring marketing/fundraising together along the line!

Quick Tip:

AI-POWERED FUNDRAISING WITH GOOGLE ADS

Performance Max + Demand Gen

Melqui Pires with TrueSense



KEY CONCEPTS-

Targeting AI - suggestive

- show ads to people who match blank
- needs good instruction
- upload donor list

Performance Max

new campaigns are running on all of google's inventory

Conversion tracking

- Google's algorithm is the coach

STRATEGY -

Performance Max

- Upload multiple videos posts, copy and all focused on DONATE.
- bottom of funnel

Demand Gen

- mid funnel
- increase awareness

BEST PRACTICES -

Performance Max

- Use Search + P.Max - power pair
↳ compliments
- only needs 1 campaign
- multi channel

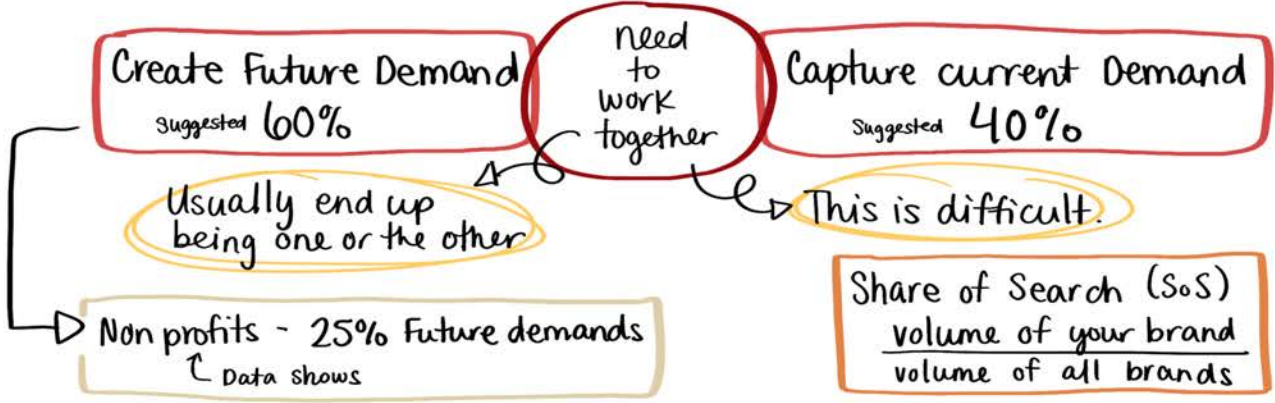
Demand Gen

- cater to All formats
- more customizable
- Youtube shorts - vertical, personal
- Youtube in-stream
- Google Discover

THE QUEST FOR FUTURE DEMAND

How investing in your brand today unlocks greater growth tomorrow

SPEAKER: Brady Josephson: charity:water



What are we missing with disposable income?

Lasers to chandeliers
 ↓
 don't light up a room Light up the room

BE A CHANDELIER

3 Shifts for future demands:

Target more customers - don't target super specific ▶ **GO FOR THE REACH**

- market penetration campaigns are the way to go.
- Reach to new customers rather than just past ones
- Largest & broadest!

Memorable Creative - Creative quality is so important!

★ **Mental Availability = Distinctive Assets × (Attention + Positive emotion)**

- Distinctive Assets: what is different or unique about your org.
 - ↳ are we denying an assumption?
 - Play off of people assumptions **Deny the assumptions!**
- ↳ these build brand recognition & loyalty
- ▶ Happiness & surprise build better brand loyalty. - humor!

On high attention channels - more spent on more channels for a long time

- Not about reach ↗ it's about attention! Interruptive gives more attention
- TV accounts ↔ invest more! ↗ mntn & tatari → if you have youtube you can have TV.
- Not all channels are the same overtime. ↗ focus on longer term



FUNDRAISING NUGGETS

Fundraising Myths

What does the data say?
CHARLIE SMITH - NextAfter



MYTH TESTING!

- Find a widely known belief
- Build test - test it (eliminate unknown variables)
- Use results - confirmed or busted

Myth #1 Small donors are not worth the investment.

broadbase	< \$1,000
mid level	\$1,000 - \$10k
major	> \$10k

16k major donors (over \$10k)

more than 1/2 major donors started at broadbase & mid level

took 8 years to become major

Keep asking questions

So why do broadbase donors upgrade?

recurring gifts, platforms, etc.

Myth #2 Acquisition is more important than reactivation.

Donor mountain



less reactivated than new donor

but reactivated gift was 60% more than new donor gifts

Be consistent with question asked.

ask more questions

Are reactivated donors more likely to become Key multi year donors?

BOTH MYTHS

BUSTED!

USE THE RESULTS!

HOW YOUR ORGANIZATION IS MISSING OUT ON THE MOST IMPORTANT AUDIENCE SEGMENTS & HOW TO FIX IT

SPEAKER: Ben Smithee : The Smithee Group



We cannot live on brand alone. Out dated tech & marketing are not great.

Marketing / fundraising has changed, but organizations haven't.

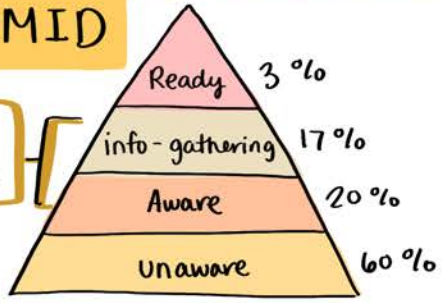
Gen Z broke your funnel.

Customer / donor segmentation matter, but how to use them?

We tend to try to get past "unaware" to "ready" as fast as possible **Don't skip the middle!**

GOLDEN PYRAMID

zone of opportunity



Traditional approach used to work.
↳ general prospecting & retargeting

misses the middle & cultivation

Gen X came & now we need more variety & more frequencies.

NEW → **Dynamic Path Advertising**

more interconnectivity - get on & off, like a subway

The Path →
Entry points (Attract)
 - prospect, awareness
Connections (Engage)
Landings (Multiply)
Stations (Convert)

Once converted at station
 back to Landing ↙
 & Station & Landing
 & station
 & then another connection
 & station & so on.

13-14 touchpoints
LOYALTY.
 ↳ then keep going!

Marketing & Fundraising are becoming the same.

KEY TAKEAWAYS:

Understand & strategically hit all levels of Golden Pyramid

Brand and data matter most

Take dynamic Path

Context creates relevance & meaning

Quick Tip:

EMBRACING A PHILANTHROPIC CURRENCY & NONCASH GIFTS

Matt Elston with Donor Money



Embracing non-cash gifts help supporters maximize impact

5 reasons donors leave

- > too many asks
- > Perceived as inefficient
- > No money to give
- > No reminder to give
- > Don't remember supporting

Loyalty Programs Work!

3 asks before thanks

- ✓ Donation amount
 - ✓ Processing fee
 - ✓ Platform tip
- ↳ NOT GOOD! ✗

Agreement + Use = Currency Value

Double Donation Difference x2

- ↳ donor gives & receives loyalty points / \$.
- ↳ supports 2 causes

This uses a philanthropic currency.

limits asks & fees
 tax efficient
 Go where \$ is
 Cooperation builds value
 embrace donor money

Maximizes impact

THE QUEST FOR THE GREATEST TREASURE OF ALL

Recurring Donors
SPEAKER: Courtney Krus: NextAfter



People coming together for a common purpose

Like a barn raising



Whole Community

- 1983 most giving - individuals
- 2023 individual giving ↓ 18%

We have to change because the world is changing.

Acquisition cost up 25%

Donor Retention down 8%

THERE IS HOPE!

People are generous and want to be a part of something bigger!

Generosity & desire to help is part of humanity

AND it is contagious!

How do we come alongside these generous people?

HELP THEM!

RECURRING GIVING
empowers people to be part of something bigger

Recurring giving is 20% of fundraising programs

& going up!

Retention rate of recurring is WAY higher than 1 time.

Recurring givers 1.6% upgrade rate
↳ 1 time is only 0.13%

Recurring donors are worth 9x more & much more likely to give legacy gifts.

WHY AREN'T WE FOCUSING ON THIS?
& HOW?

UPGRADE: Thank them! - immediately!
▶ only 12% are asking about recurring in the 1st 90 days of first gift.
▶ recurring 1st year donors - 85% likely to retain in 2nd year

framework

ACQUISITION: Value proposition
Donor needs to know why they should give a recurring gift over 1 time or some where else.

- ▶ Ask donors & TEST!
- ▶ increase clarity on the value
- Recurring helps donors be part of something bigger!

★ Value prop must be discovered.

- ▶ Visible button! Give the option!

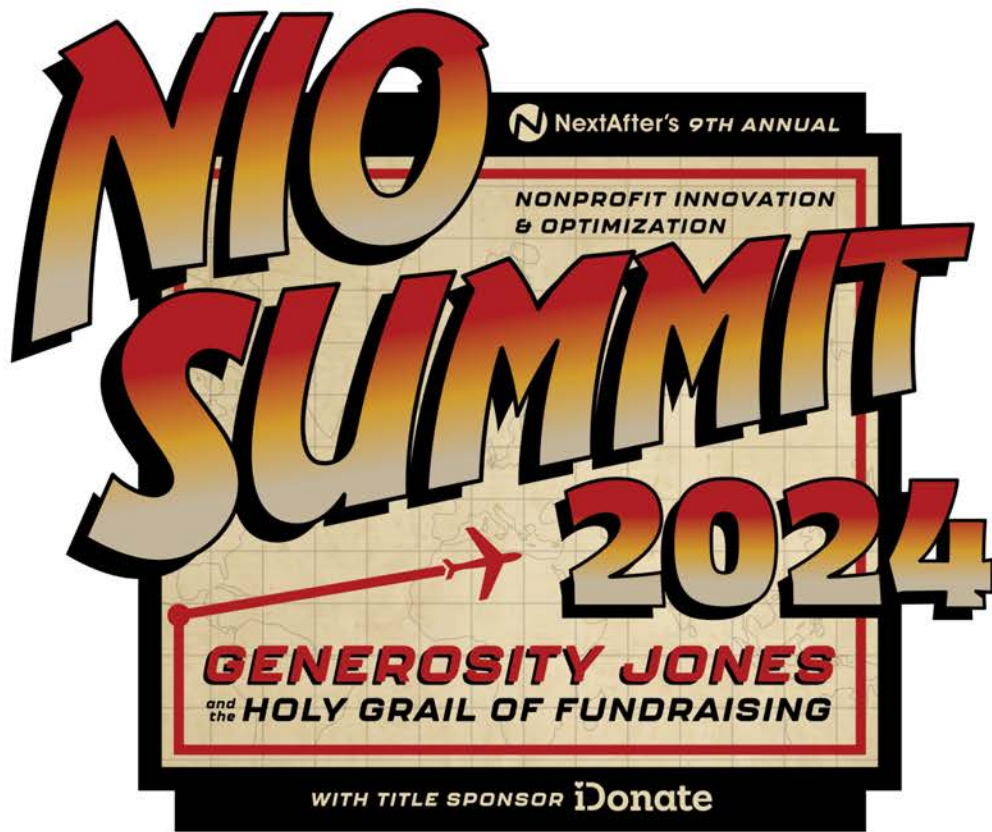
RETENTION: 85% retain - 15% churn
▶ churn = pain = consequences
DRIVE ACTION

- ▶ Monthly donation landing page - offer ACH
- ▶ Steward recurring donors - special invites, newsletters, handwritten cards, call them, share stories

The framework is simple - the problem is us.

- ▶ Quick wins aren't going to grow generosity sustainably
- ▶ stop comparing donors to netflix subscribers

We must be bold & enough to shift our mindset & make the changes - together let's build a barn!



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