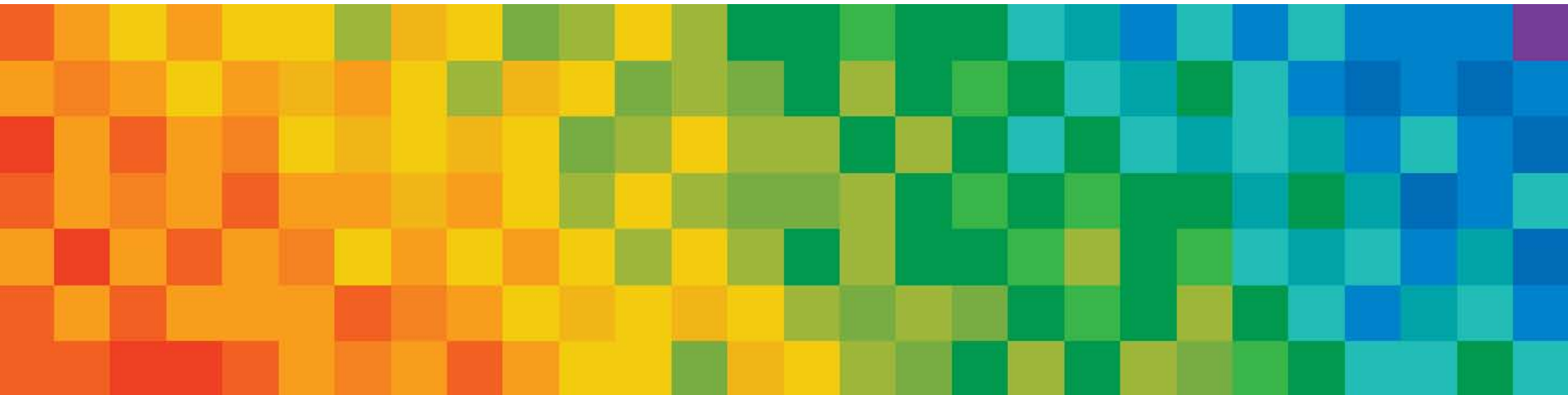




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The Five Pillars of Fundraising Strategy

June 8, 2011 Twitter: #5pillarsFR



5 Pillars of Fundraising Strategy



1. **Structure and systems support a “whole pyramid” strategic focus**

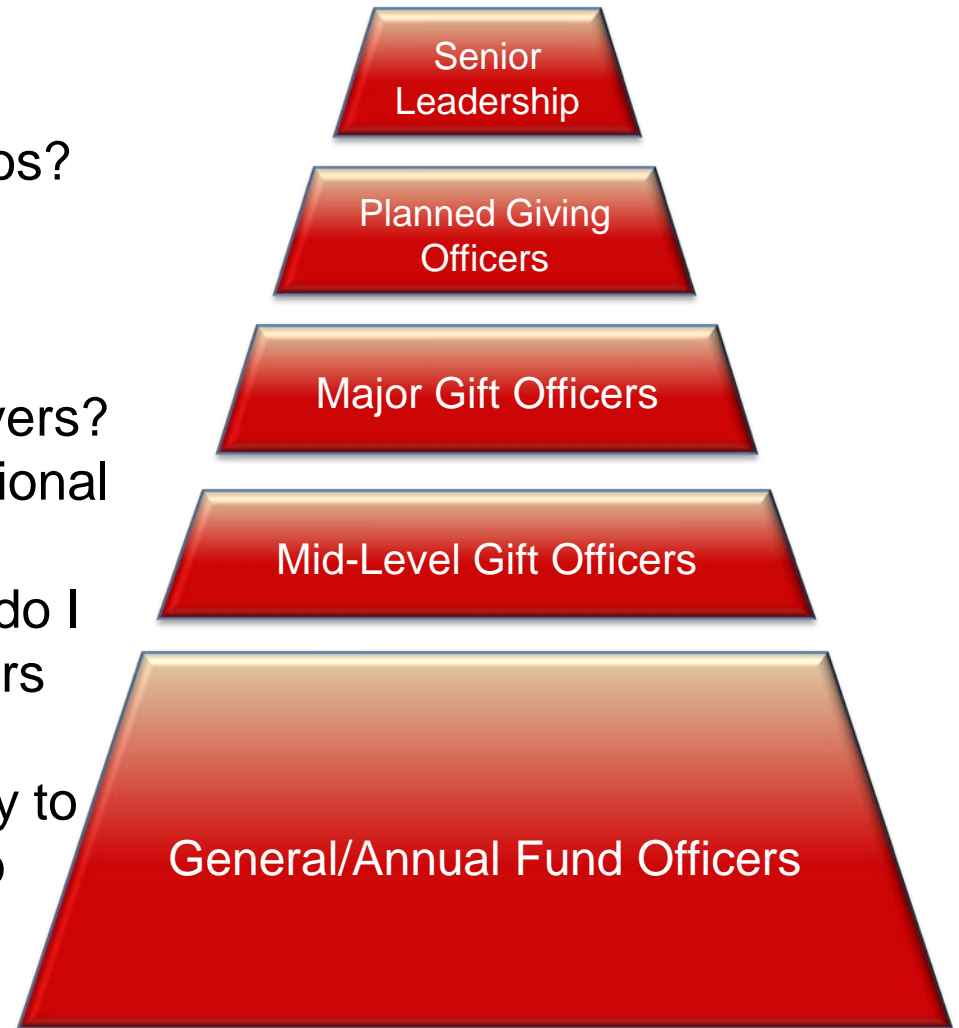




Whole Pyramid Focus

Questions

- Are people/units operating in silos?
- How well is everyone serving all levels of the donor relationship?
- Are strategies based solely on structure? Are donors across layers?
- Who is involved in the organizational planning process?
- As a direct response specialist, do I care if any direct response donors make a major gift?
- As a major gift officer, am I ready to ask if one of my donors wants to include us in their estate plan?





Whole Pyramid Practices

- Strategies drive donors up through pyramid layers
- Incentives encourage donor growth, not hoarding
- Communication calendars are developed with input from all departments that affect fundraising
- Measurements evaluate donor movement across layers
- Spirit of cooperation exists in the culture for open and robust sharing of donor data...and relationships
- Officers maintain relationships across layers



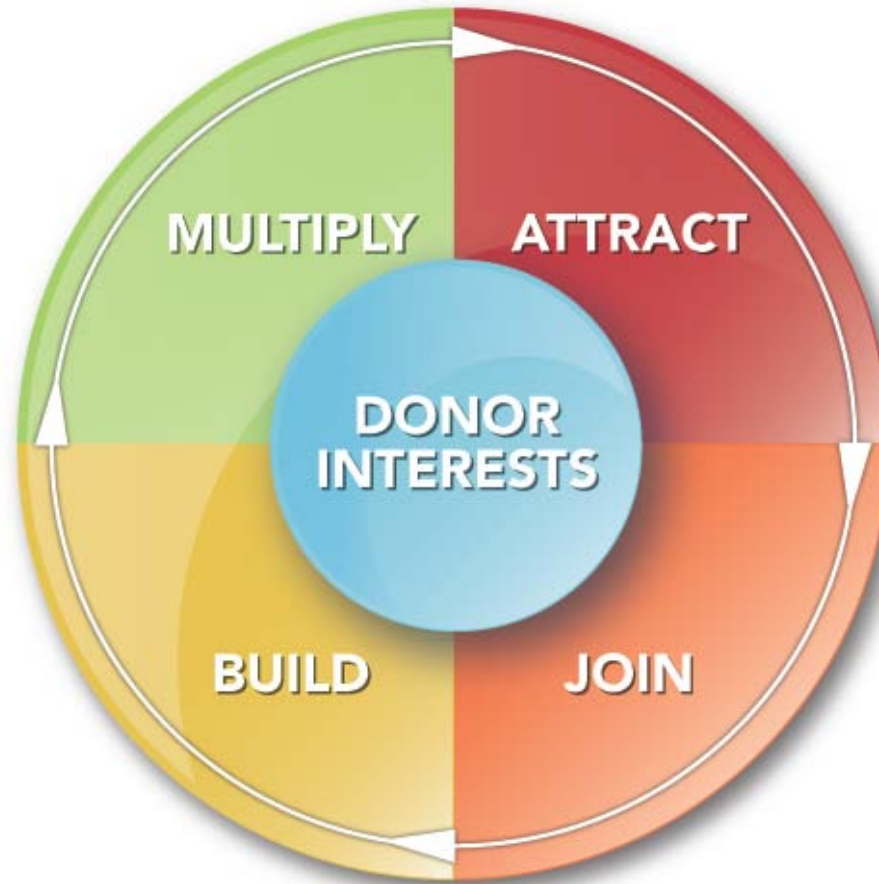
5 Pillars of Fundraising Strategy



1. Structure and systems support a “whole pyramid” strategic focus
2. **Behavioral data is integrated into donor profiles and contact strategies**



The Pursuant Paradigm



Driving the Relationship Lifecycle



Engaging Interests: Data Sources



- Donor data
 - RFM data (recency, frequency, monetary value)
 - Campaign response
- Wealth/Lifestyle data
- Donor research: interests, compelling language
- Behavioral data
 - Survey responses
 - Videos viewed
 - Microsite clicks
 - Events

Engaging and Observing Interests



**Personal URL
(Direct Mail)**



Cultivation Email

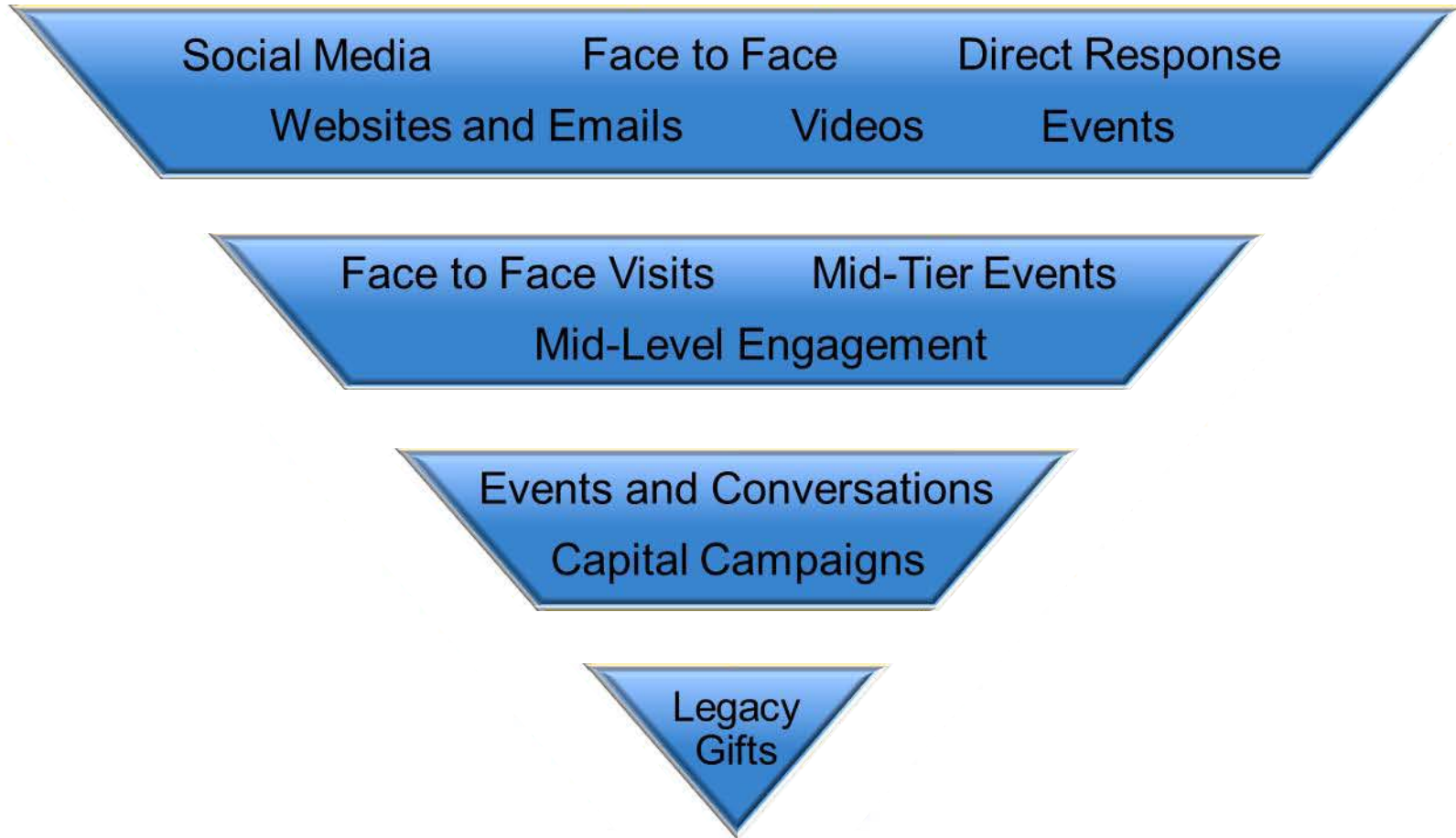


Microsite

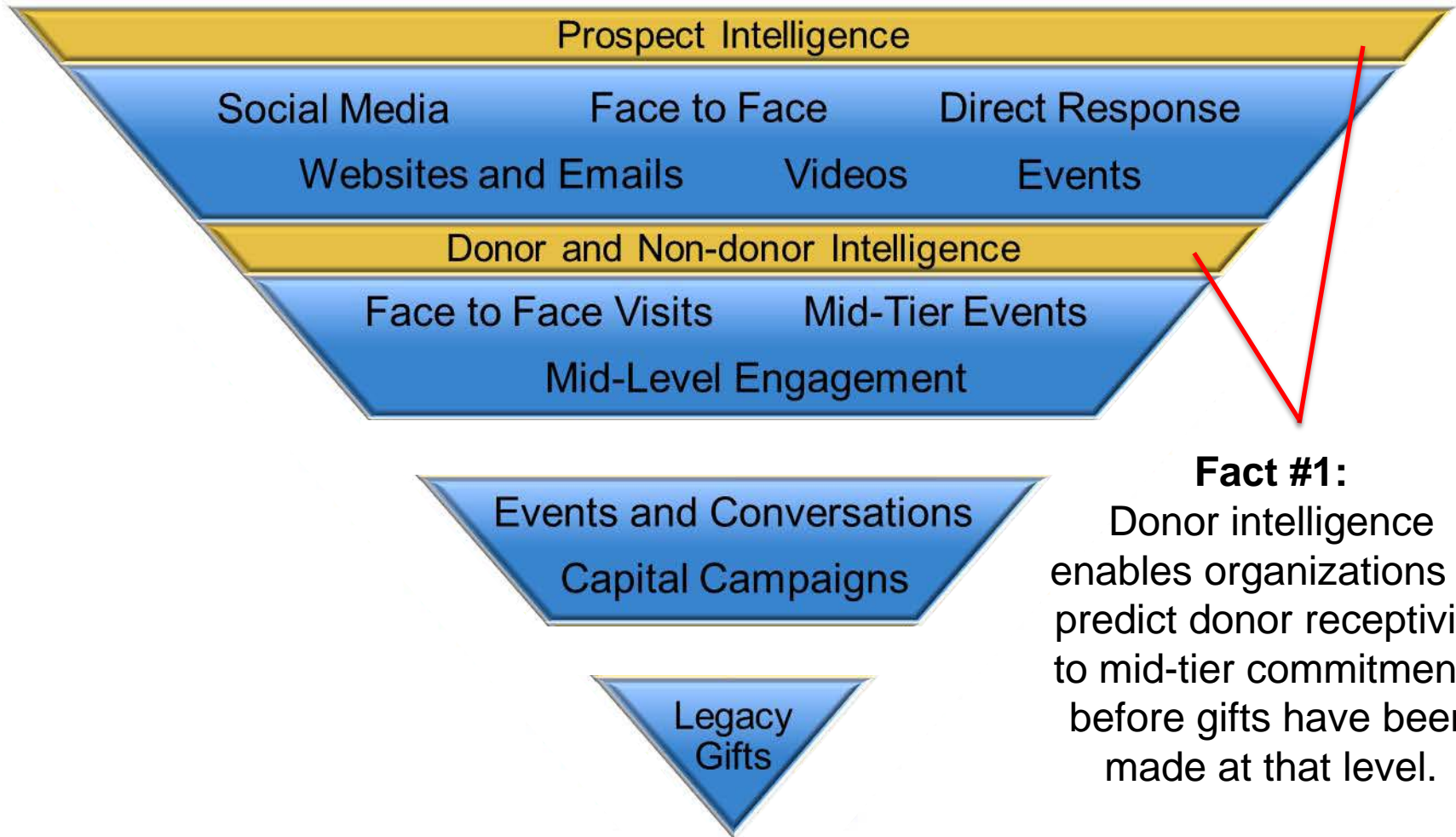
Donor Intelligence



Driving Donors Through the Pyramid



Driving Donors Through the Pyramid

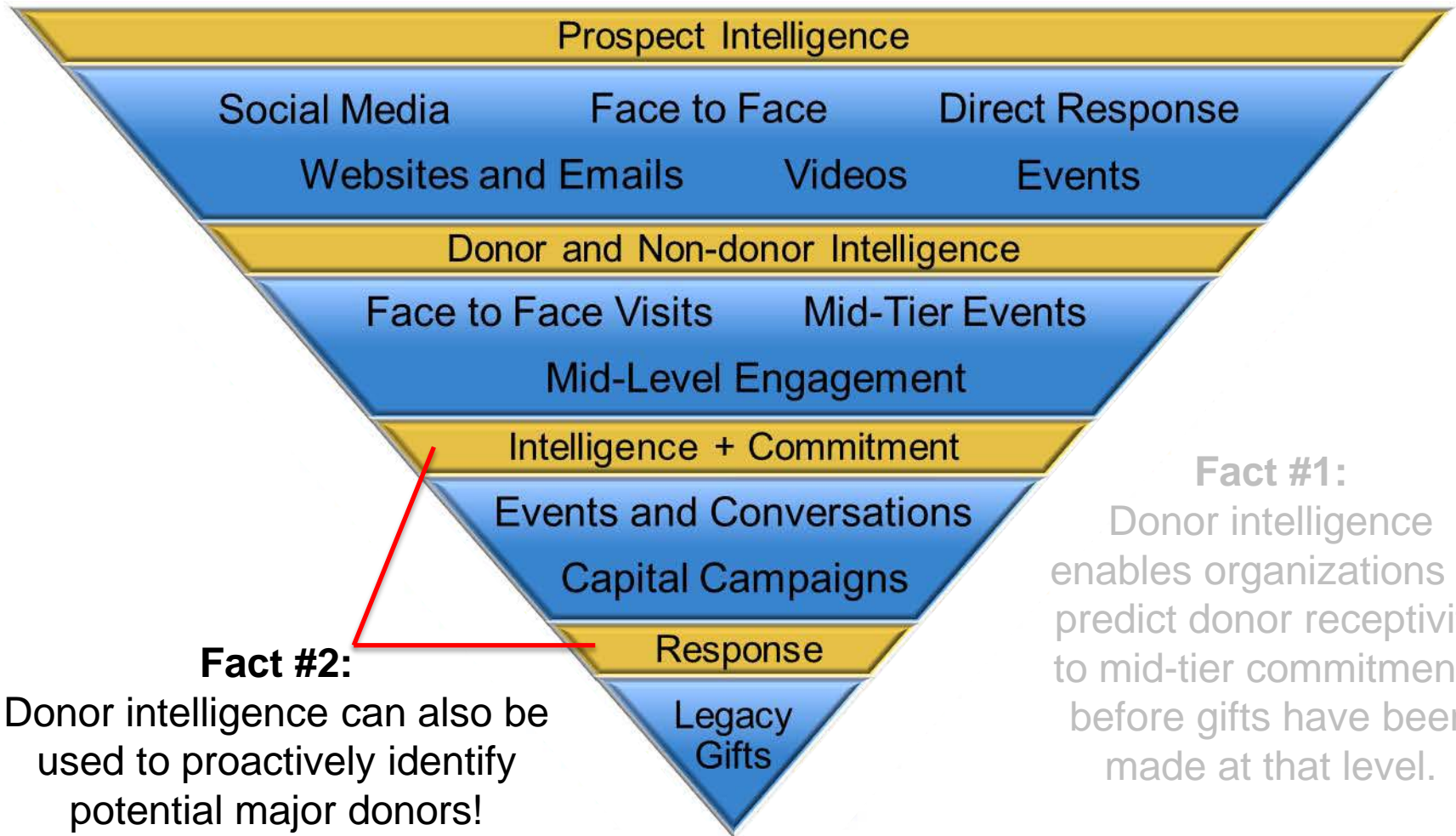


Fact #1:

Donor intelligence enables organizations to predict donor receptivity to mid-tier commitments before gifts have been made at that level.



Driving Donors Through the Pyramid



Fact #2:

Donor intelligence can also be used to proactively identify potential major donors!

Fact #1:

Donor intelligence enables organizations to predict donor receptivity to mid-tier commitments before gifts have been made at that level.



5 Pillars of Fundraising Strategy



1. Structure and systems support a “whole pyramid” strategic focus
2. Behavioral data is integrated into donor profiles and contact strategies
3. **Donor behavior is driven through catalytic interactions**



Driving Giving Behavior



All behavioral change comes down to answering two questions:

1. **Is it worth it?** If not, why waste the effort?
2. **Can it be done?** If not, why try?

*Source: Influencer: The Power to Change Anything;
by Patterson, Grenny, Maxfield, McMillan, and Switzler; 2007*





Driving Giving Behavior

To overcome persistent resistance:

1. Create personal experiences, or...
2. Tell stories (vicarious experiences)
 - Changes “cause and effect” assumptions
 - Impacts a different part of the brain
 - Avoids evaluation centers
 - We learn by watching others
 - It is as if the experience actually happened to us

But what can we enlist beyond verbal persuasion?



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Donors don't want to give	Donors don't know how to give
Social (Leadership)	No peer pressure encouraging giving	No team support for giving
Structural (Non-Human)	Rewards not aligned; no accountability	Environment interferes with giving

Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Values	Clarity
Social (Leadership)	Support	Teamwork
Structural (Non-Human)	Incentives	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Clarity
Social (Leadership)	Support	Teamwork
Structural (Non-Human)	Incentives	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Easy to give, needs understood
Social (Leadership)	Support	Teamwork
Structural (Non-Human)	Incentives	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Easy to give, needs understood
Social (Leadership)	Harness formal and informal support	Teamwork
Structural (Non-Human)	Incentives	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Easy to give, needs understood
Social (Leadership)	Harness formal and informal support	Use the power of teams to encourage giving
Structural (Non-Human)	Incentives	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Easy to give, needs understood
Social (Leadership)	Harness formal and informal support	Use the power of teams to encourage giving
Structural (Non-Human)	Align recognition, feedback regarding impact	Environment



Driving Giving Behavior



	Motivation	Ability
Personal (Intrinsic)	Link mission, values to giving	Easy to give, needs understood
Social (Leadership)	Harness formal and informal support	Use the power of teams to encourage giving
Structural (Non-Human)	Align recognition, feedback regarding impact	Remove physical barriers to engagement



Driving Giving Behavior



Level	Motivation (Is it worth it?)	Ability (Can it be done?)
Personal (Intrinsic)	<ul style="list-style-type: none">• Impact communicated in terms people care about• Pictures and people impacted are used to tell the story – “humanize” the data	<ul style="list-style-type: none">• Donors know what is expected and how they can support the effort successfully• Complex challenges are broken into smaller, achievable, understandable tasks
Social (Leadership)	<ul style="list-style-type: none">• Formal leadership has communicated support and are involved• Opinion leaders are identified; trust is built, and they are engaged in the project	<ul style="list-style-type: none">• Leadership, experts, communication and fundraising – Team-based strategies• Information is complete (collateral, results, etc.)
Structural (Non-Human)	<ul style="list-style-type: none">• Giving is recognized and appreciated in advance outcomes• Officers are incented to do the right things	<ul style="list-style-type: none">• Create proximity between the donor, the organization/leadership, and constituents• Environment reflects project priorities – you “see it” and “feel it” when you walk around





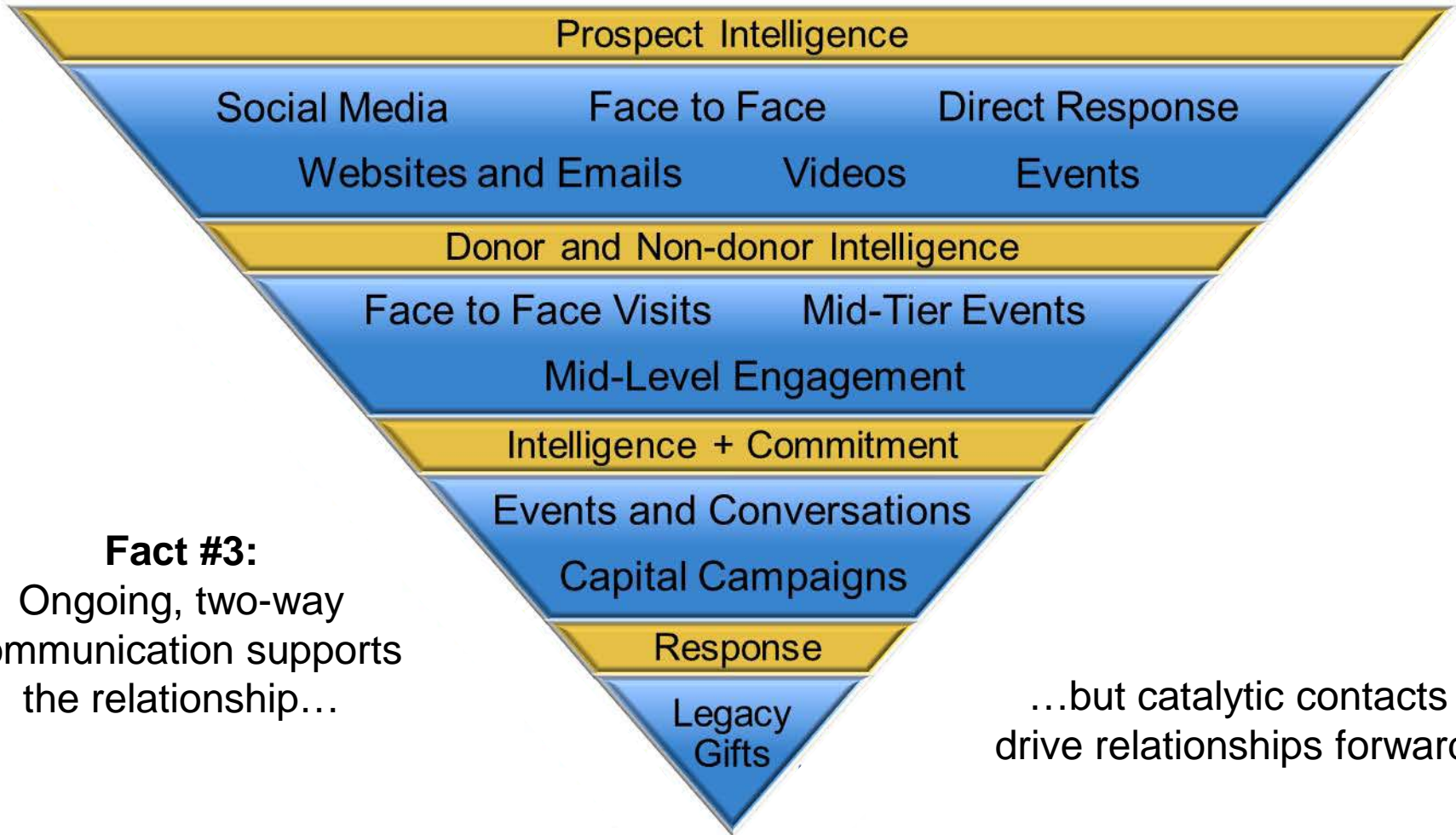
Driving Giving Behavior

What is a “catalytic” interaction?

- Meeting is proactively established
- Conversation establishes trust
- Information shared grabs interest
- Opportunity is emotionally compelling
- Conversation challenges support beyond current giving levels
- Next engagement step is defined and invited



Driving Donors Through the Pyramid



Fact #3:
Ongoing, two-way
communication supports
the relationship...

...but catalytic contacts
drive relationships forward!



5 Pillars of Fundraising Strategy



1. Structure and systems support a “whole pyramid” strategic focus
2. Behavioral data is integrated into donor profiles and contact strategies
3. Donor behavior is driven through catalytic interactions
4. **Data drives strategy**



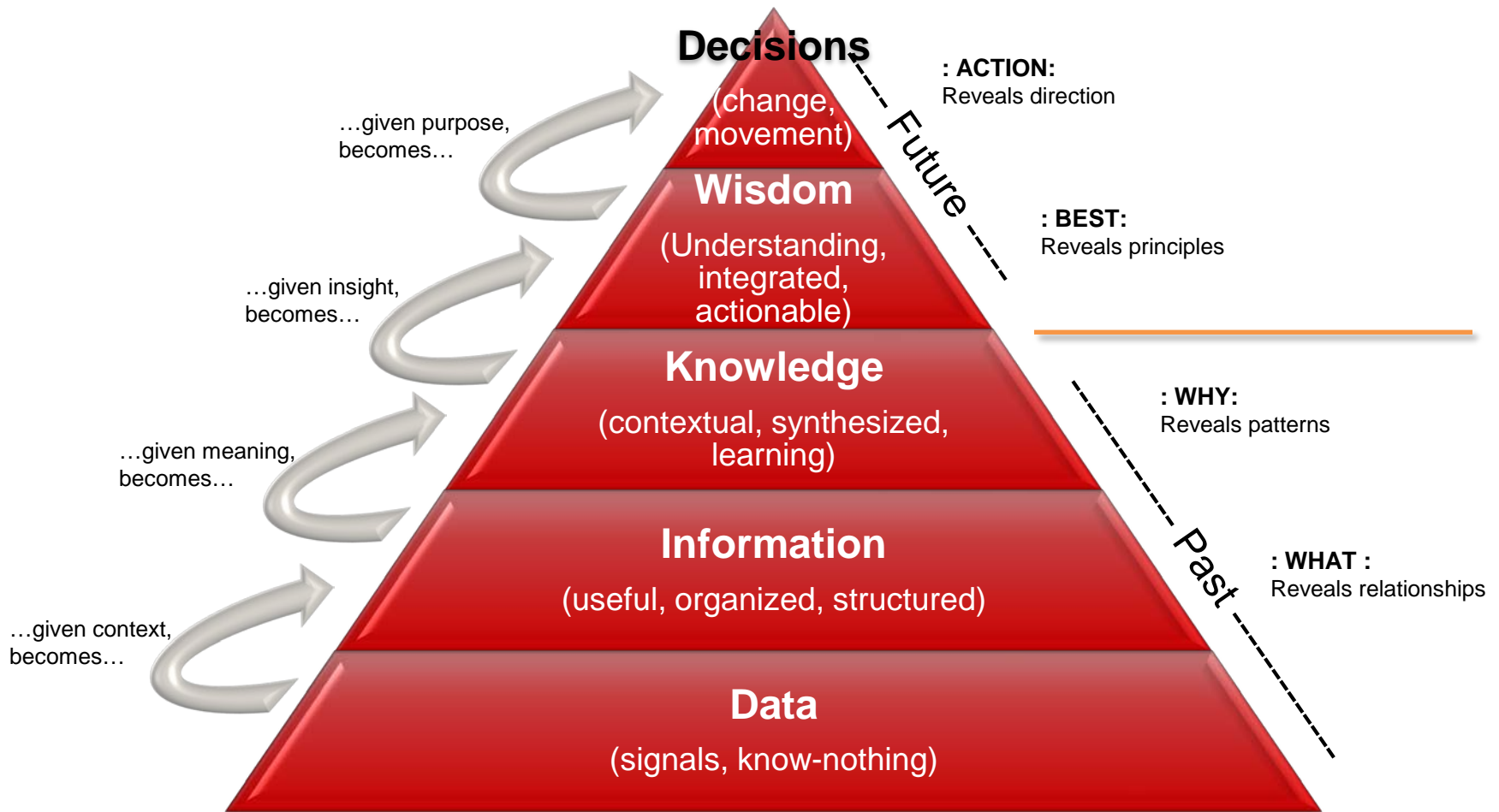


What Typically Drives Strategy?

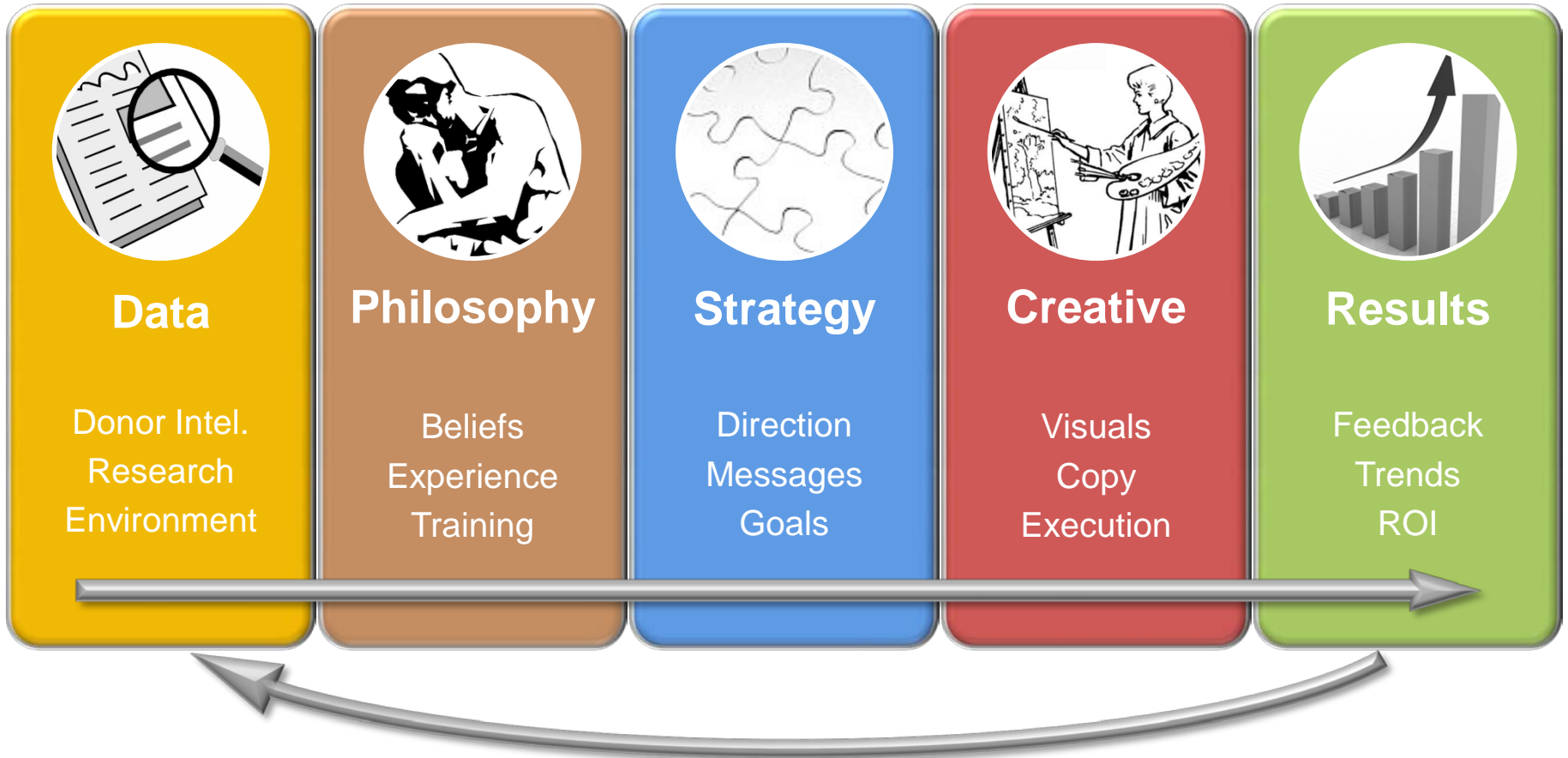
- What is familiar
- Whatever is cheap
- Whatever is easy
- What worked last year
- Existing capabilities
- Shiny new objects
- Whatever worked over at _____



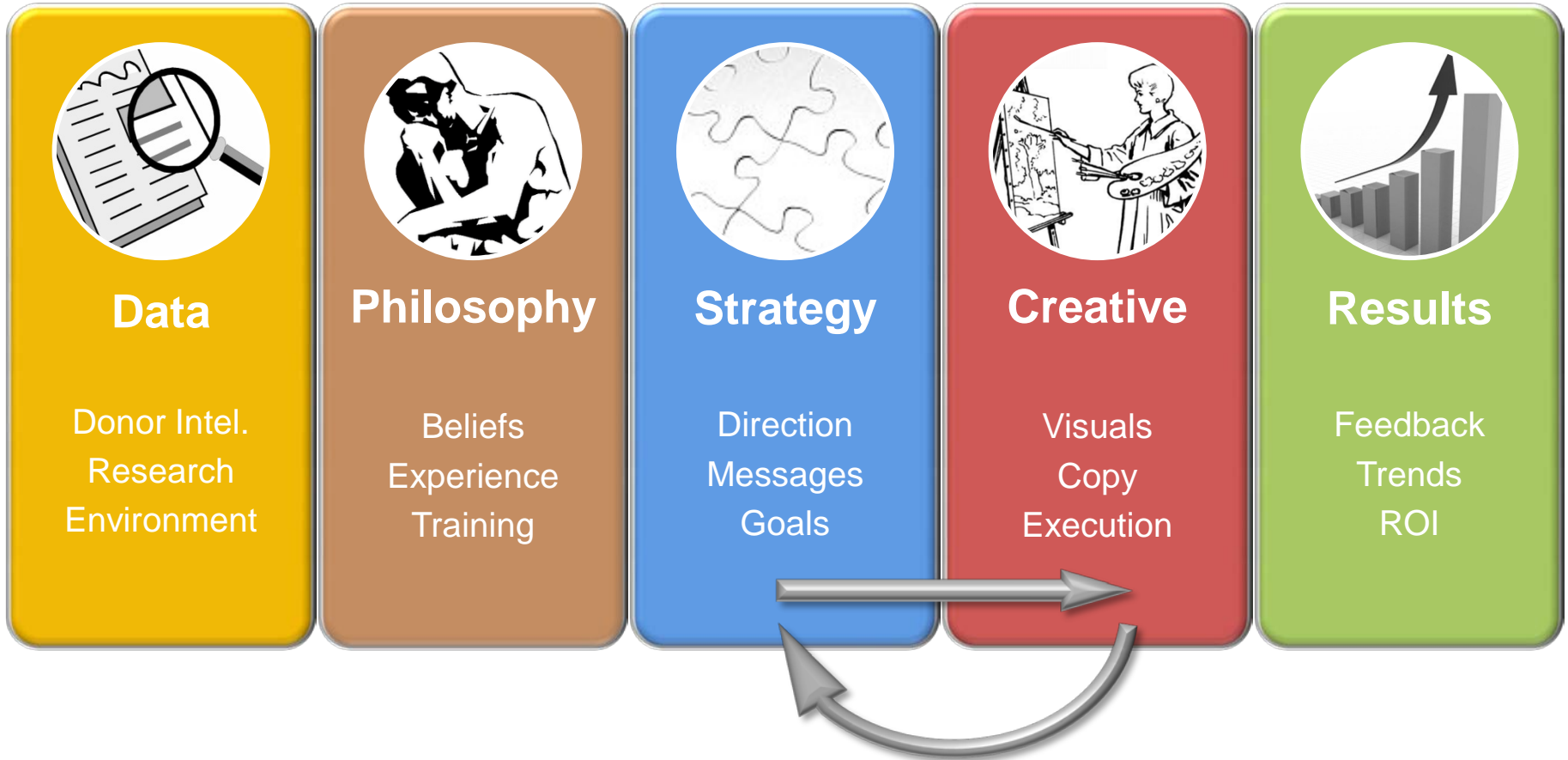
Data Drives Strategy



Data Drives Strategy



What Typically Drives Strategy?



Data Drives Strategy: Data Sources



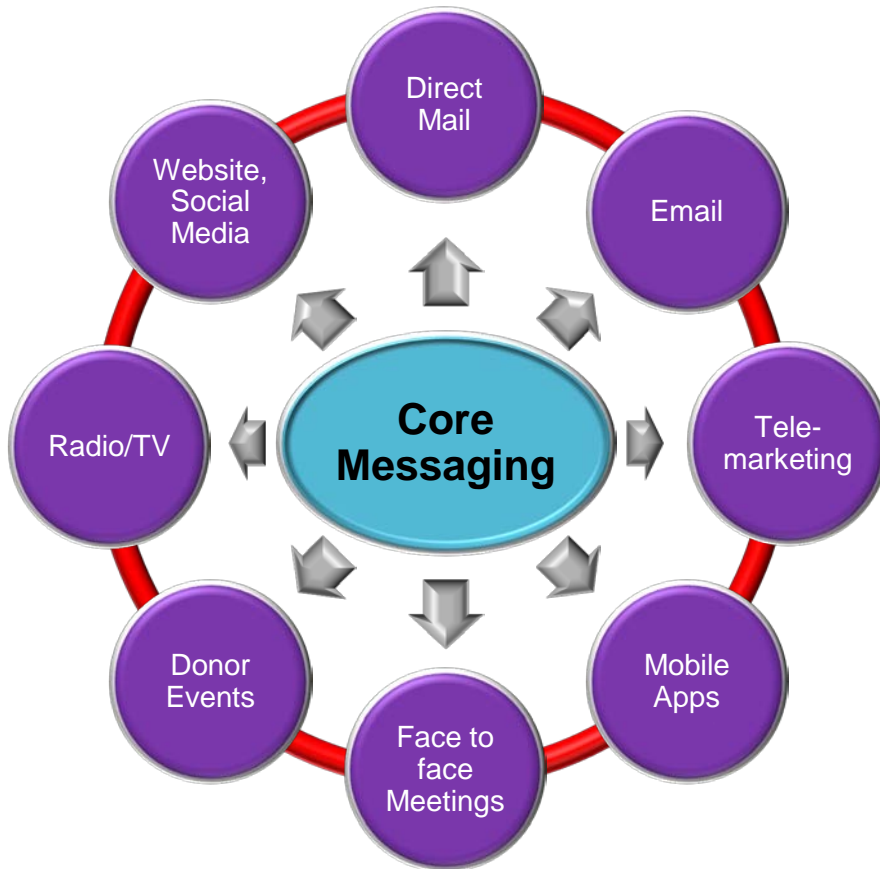
Fundraising Assessment Areas	
1 Constituent Messaging	1.1 Core Messaging 1.2 Brand Promise 1.3 Case for Support 1.4 Impact Measurement
2 Donor Intelligence	2.1 System Support 2.2 Tracking and Testing 2.3 Analytic Dashboards 2.4 Accessible Information 2.5 Actionable Reporting
3 Integrated Communication	3.1 Lifetime Value 3.2 Communication Planning 3.3 Cross-Channel Engagement 3.4 Donor Stewardship 3.5 Attract and Join 3.6 Build and Multiply
4 Fundraising Capacity	4.1 Development Structure 4.2 Staff Expertise 4.3 Fundraising Leadership 4.4 Strategic Leadership 4.5 Catalytic Engagement

5 Pillars of Fundraising Strategy



1. Structure and systems support a “whole pyramid” strategic focus
2. Behavioral data is integrated into donor profiles and contact strategies
3. Donor behavior is driven through catalytic interactions
4. Data drives strategy
5. **Donor development initiatives supported through cross-channel communication**

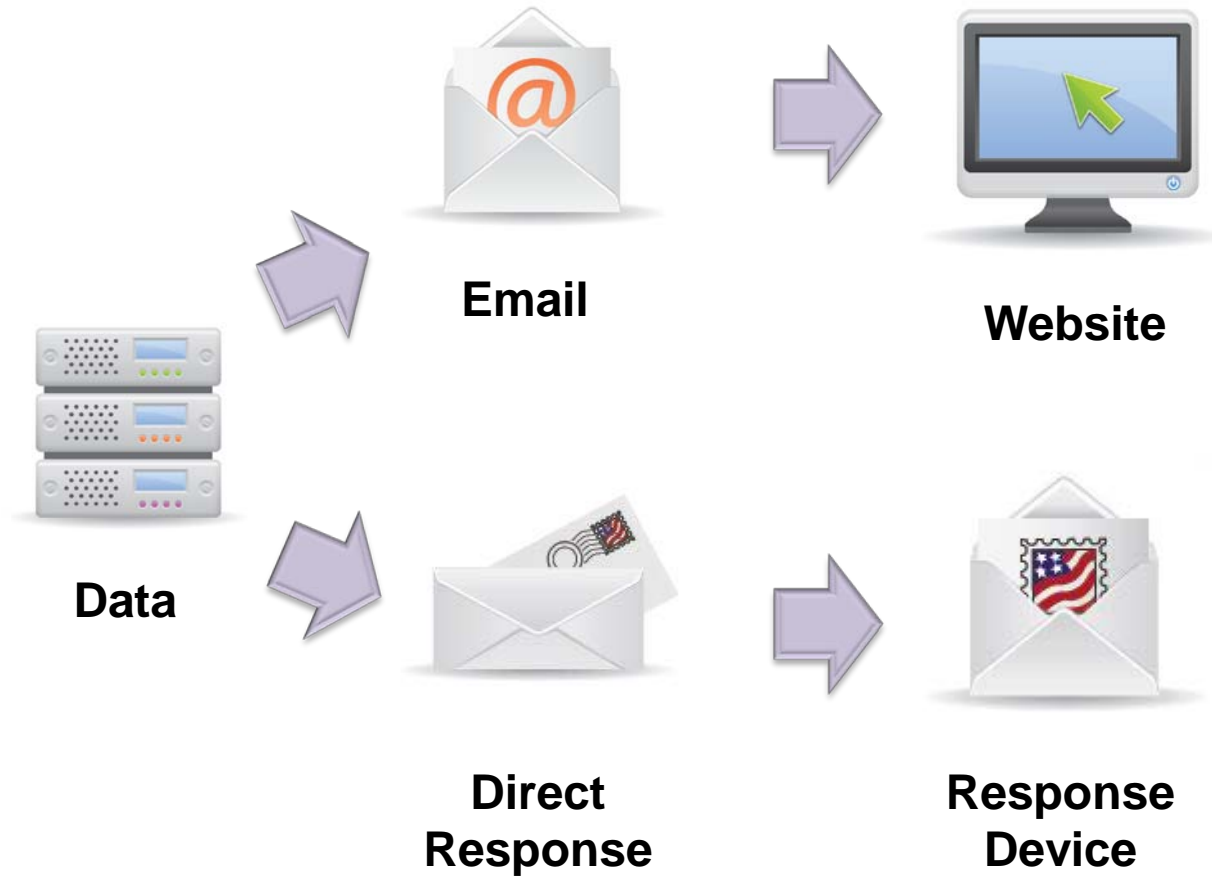
Cross-Channel Engagement



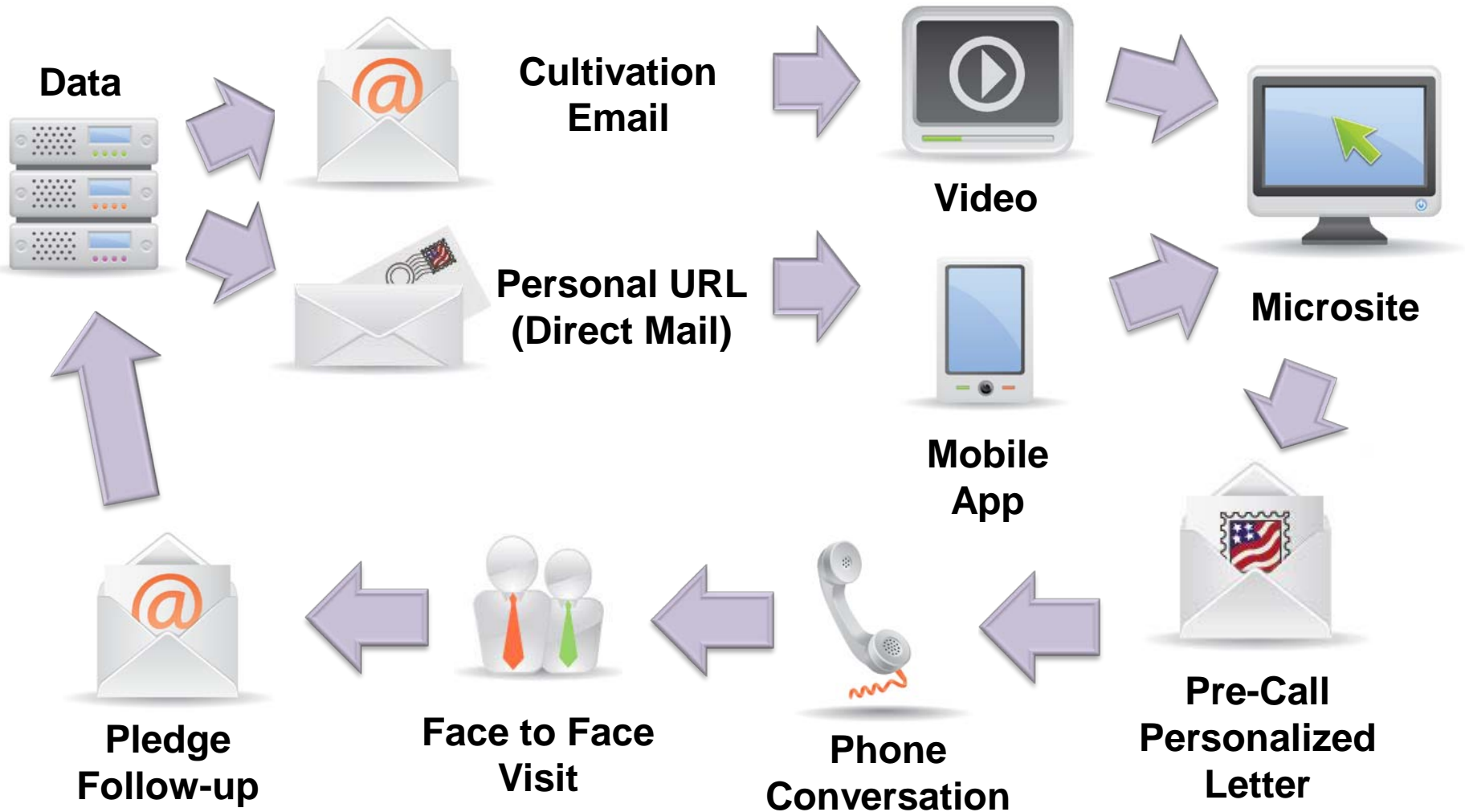
- **Strategic:** Thoughtful and planned
- **Consistent:** Reflects a common message or theme
- **Integrated:** Anticipates and drives cross-channel
- **Congruent:** Works within the strengths of each channel
- **Intentional:** Drives toward stated goals

Key: Using the appropriate channel for the appropriate purpose at the appropriate time!

Cross-Channel Engagement



Cross-Channel Engagement





Cross-Channel Engagement

What kind of initiatives can be accomplished through cross-channel communication?

- Behavioral invitations
- Engagement efforts (initial gifts, upgrade programs)
- Follow-up strategies
- Reactivation programs



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- 3. Donor behavior is driven through catalytic interactions**
- 4. Data drives strategy**
- 5. Donor development initiatives supported through cross-channel communication**

Questions





PURSUANT[®]

Redefining fundraising.

