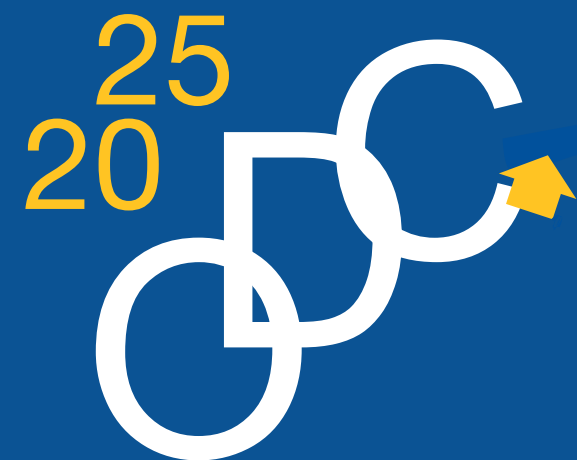


1



Breakout Session

The Retention Games: May the Donors Be Ever in Your Favor

Erik Tomalis

Avid AI



Sponsored By

Avid

Avid

THE DONOR RETENTION GAMES.
MAY THE DONORS BE IN YOUR FAVOR.



ERIK TOMALIS

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LET'S CONNECT





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LET'S CONNECT



Avid

FUNDRAISING, REBUILT

Discover how an **AI-empowered team** can radically transform your fundraising efficiency and effectiveness in the free eBook.

FUNDRAISING, REBUILT.

How Avid Is
Transforming the
Way Nonprofits
Raise Money



WHAT MATTERS MOST TO DONORS

HEALTHY DATA, HEALTHY RELATIONSHIPS

BREAK THE SILOS

RIGHT MESSAGE, RIGHT TIME

PERSONALIZATION THAT SCALES

WAYS TO MEASURE RETENTION

NOT THE WALLET

**“WE HAVE TO DEVISE MEANS OF
MAKING KNOWN THE FACTS IN
SUCH A WAY AS TO TOUCH THE
IMAGINATION OF THE WORLD. THE
WORLD IS NOT UNGENEROUS, BUT
UNIMAGINATIVE AND VERY BUSY.”**



This Photo by Unknown Author is licensed under CC BY-NC-ND

Eglantyne Jebb, Founder of Save the Children



Giving is **personal**

Donors aren't numbers—they're people.

Today's donors demand personal, meaningful connections to the causes they support.

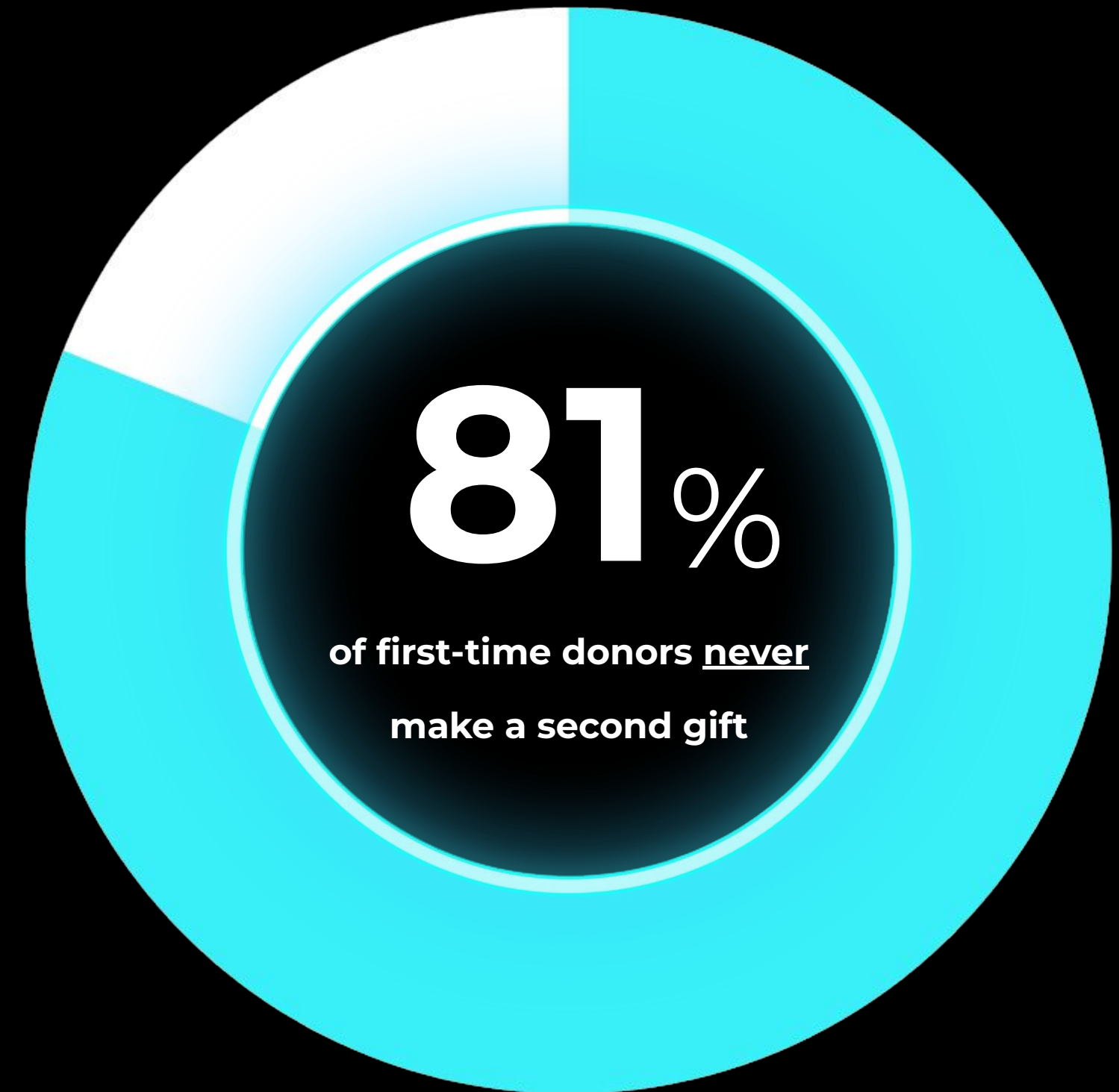
The outcome?

Inappropriate asks & impersonal follow-up lead donors to opt out.

Resulting in:

- ✗ **Lost donors**
- ✗ **Stalled missions**
- ✗ **Stressed teams**

Source: The Fundraising Effectiveness Project



The cost of falling behind

- Donors expect personalization on par with what they get from brands like Amazon.
- Nonprofits are stuck with disconnected systems and rising costs.
- Inefficiency drains billions from critical missions, leaving them underfunded.

For decades, nonprofits have relied on agencies to overcome these challenges—**but at what cost?**

ACTIVITY

**Make a \$5 Donation
to Your Organization**

Was anyone **unable** to donate?

Raise your hand if you got a **thank you message** / confirmation page.

Raise your hand if you received an **immediate confirmation email** or thank you email.

How thanked do you **feel**?



Very minimal thank
you messaging.



I was thanked, but it
felt transactional.



I feel very well
thanked for my gift.

What Matters Most to Donors

“We make a living by what we got, but we make a life by what we give.” Winston Churchill

THE TREND

NONPROFITS HAVE **STRUGGLED** **TO MAINTAIN** THEIR REVENUE.

Avid

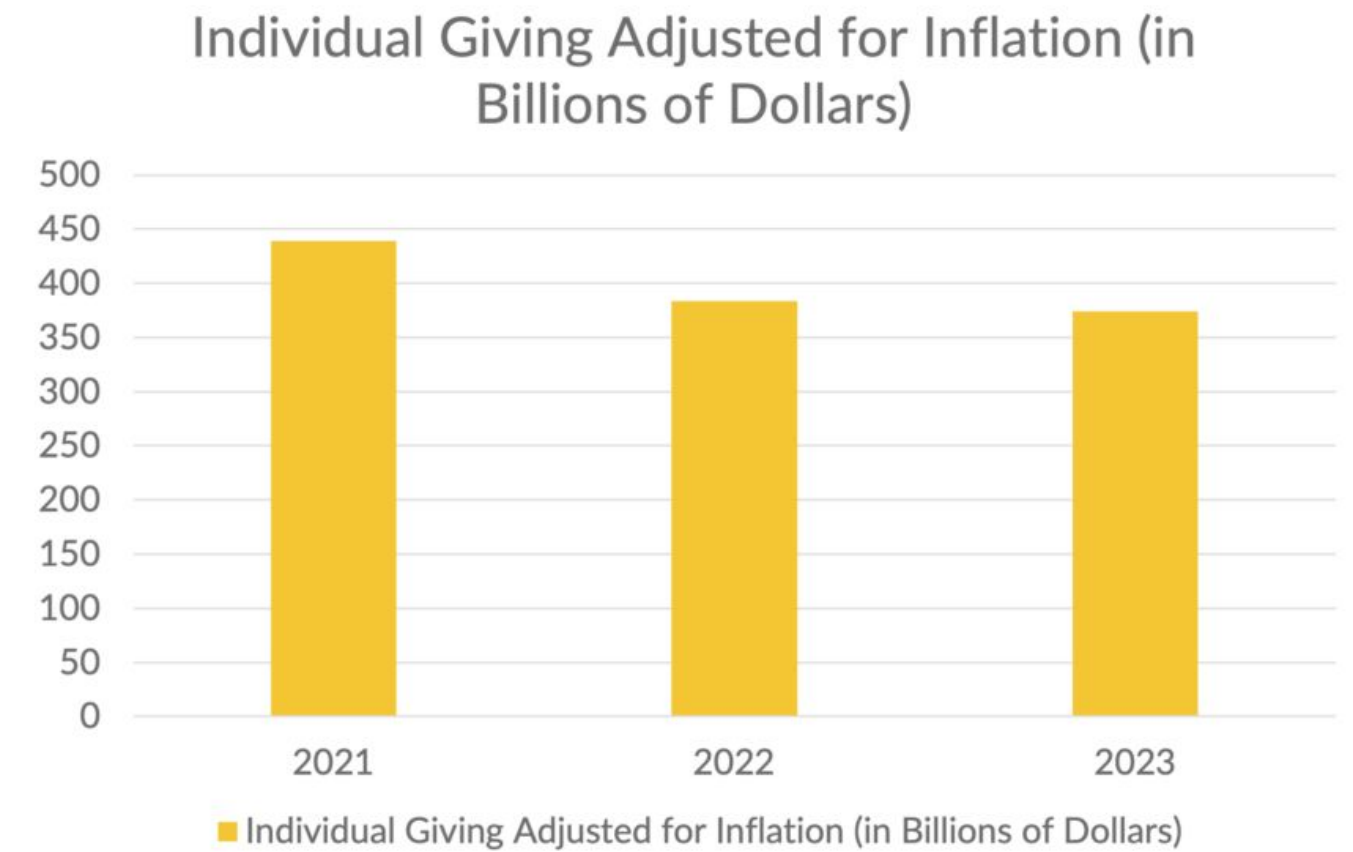
Percentage Change in Revenue (from previous period)

How has per-organization revenue changed compared to the previous period, based on the current filters?



INDIVIDUAL GIVING IS ON A DOWNWARD TREND.

(According to Giving USA Data)

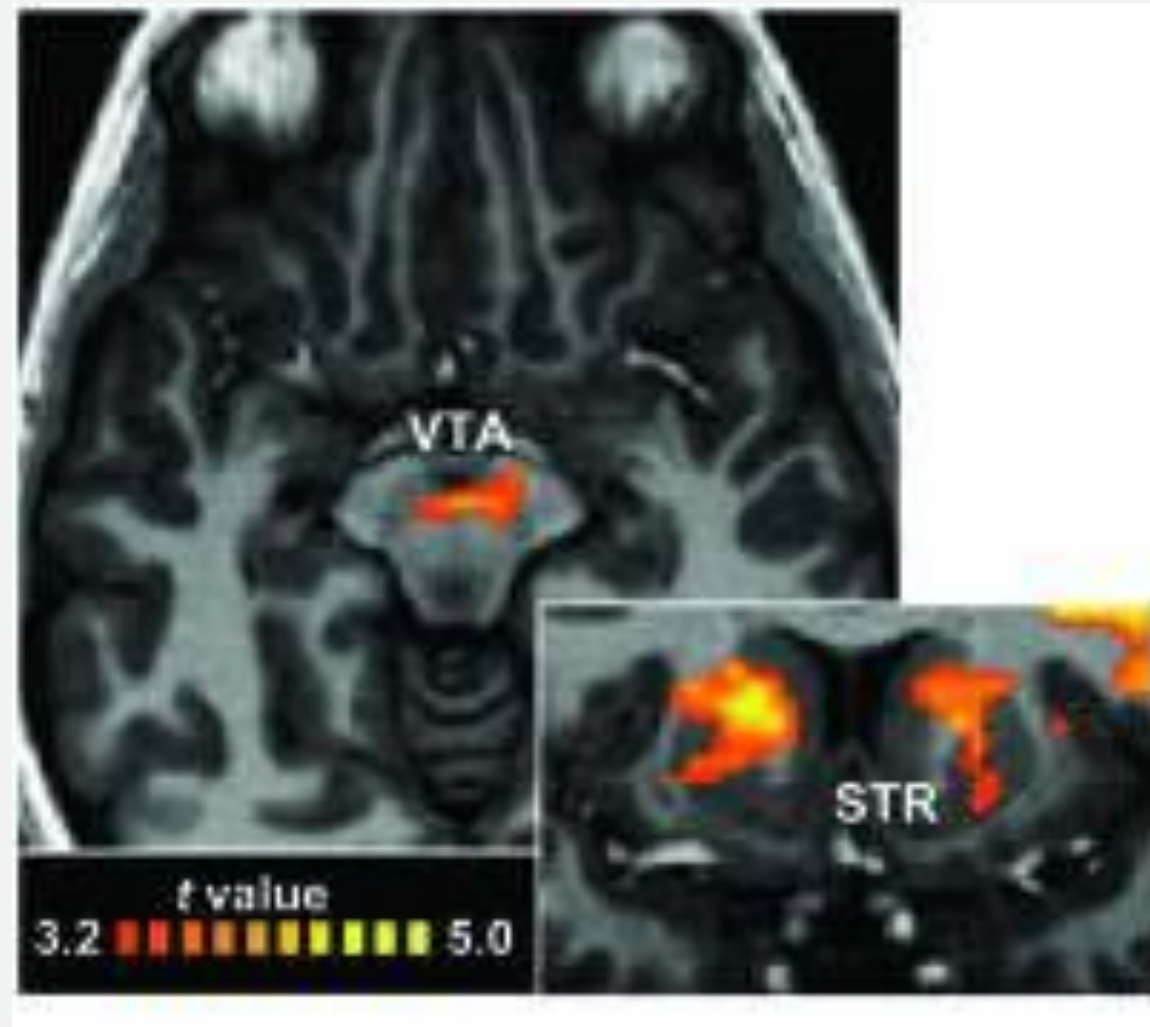


Why Do Donors Give?



Source: U.S. Trust® Study of High Net Worth Philanthropy

The Science Behind Giving



Charitable giving is rewarding (like receiving money)



But uniquely involves oxytocin-rich social attachment brain regions (used in maternal and romantic love)



Philanthropy is a “social act” using the mechanisms of FAMILY bonding—we create a “synthetic family” with other donors.

The Link Between Charity, Happiness & Health

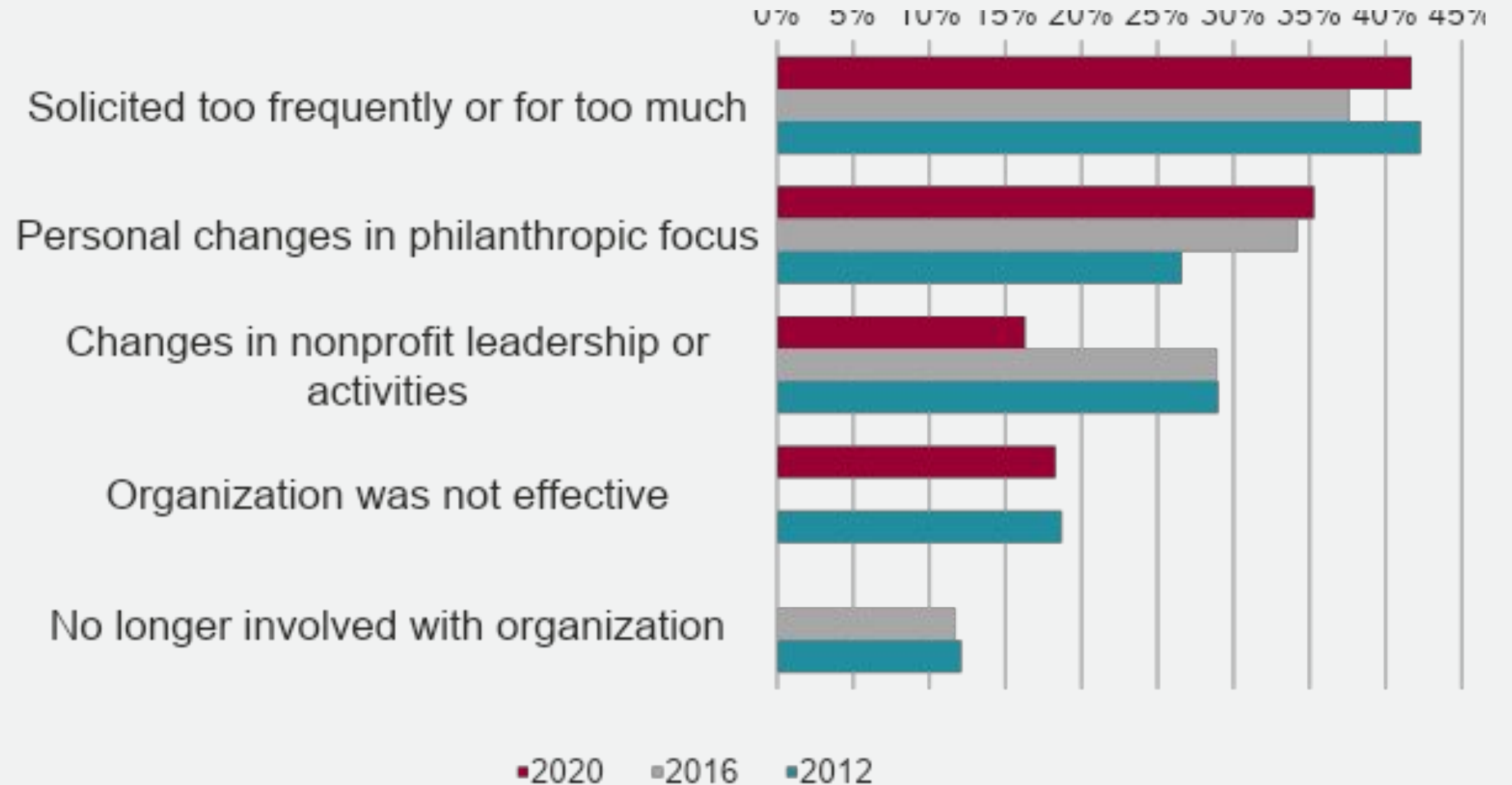


People who made a philanthropic gift were 43% more likely to say they were “very happy” compared to those who did not make a gift.

Similarly, volunteers were 42% more likely to say they felt “very happy.” While non-volunteers stated they were “not happy at all.”

Donors were 25% more likely to say their health was “excellent” or “very good” while non-donors were twice as likely to say their health was “poor or fair.”

Why Do Donors Stop Giving?



Source: Bank of America Study of High Net Worth Philanthropy

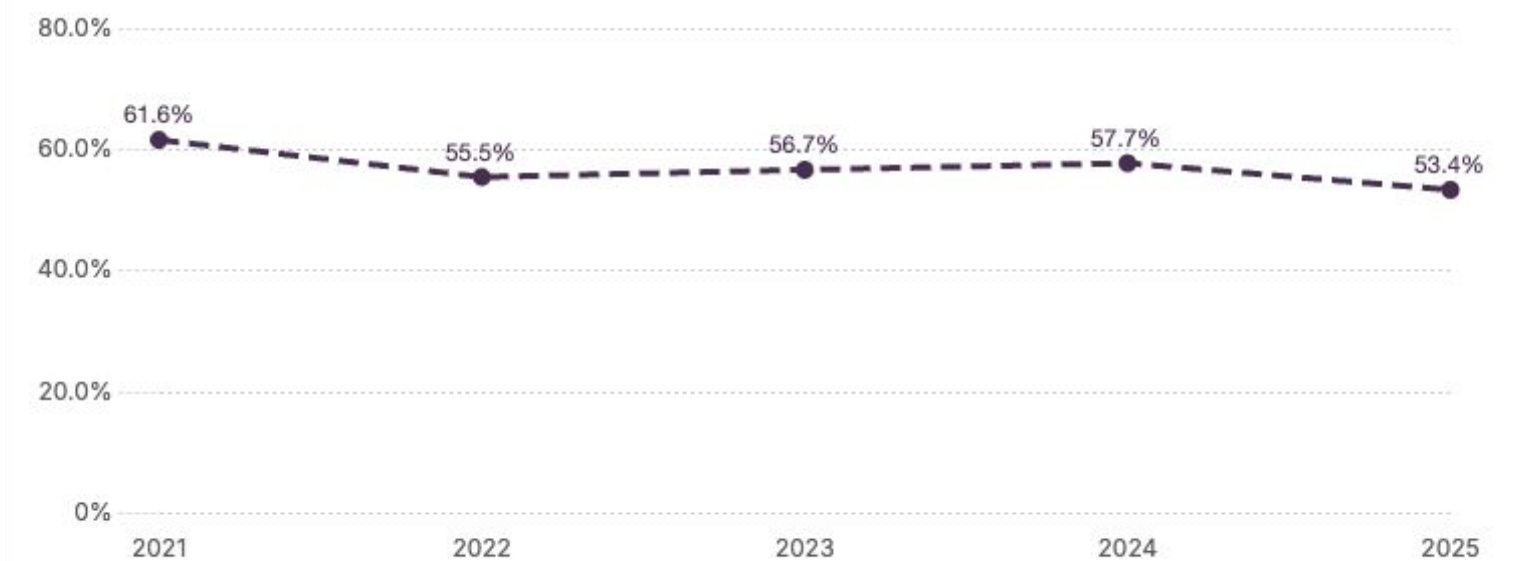
43%

Average Donor Retention Rate

DONOR RETENTION IS DOWN
13% OVER THE PAST 5 YEARS.
(A Decrease of 8 Percentage Points)

Avid**Retention Rate** ?

What percentage of donors were retained from the previous period?



YOU MUST RAISE
21% MORE IN 2025
TO HAVE THE SAME IMPACT AS 2021.

CPI Inflation Calculator

\$

in

has the same buying power as

in

 U.S. BUREAU OF LABOR STATISTICS

**YET MOST FUNDRAISING DISCUSSIONS
ARE CENTERED ON DONOR ACQUISITION,
NOT RETENTION.**

**INVESTING IN ACQUISITION WHILE
IGNORING RETENTION IS LIKE RIDING A
STATIONARY BIKE...**

**YOU'RE WORKING HARD, BUT
YOU'RE NOT GOING ANYWHERE.**





43%

And it's
getting
worse....

AVERAGE
43%



FIRST-TIME
23%



REPEAT
60%



MONTHLY
90%

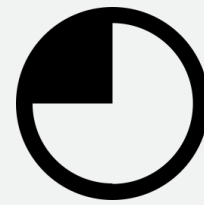


Healthy Data, Healthy Relationships

HEALTHY DATA, HEALTHY RELATIONSHIPS



Understand your
donors



Segment your donor
base



Maintain accurate
and up-to-date
donor data

By knowing your donors deeply and maintaining healthy data, you can build stronger, more meaningful relationships that lead to increased engagement and support.

KEY POINTS



Importance of Clean,
Trusted Data

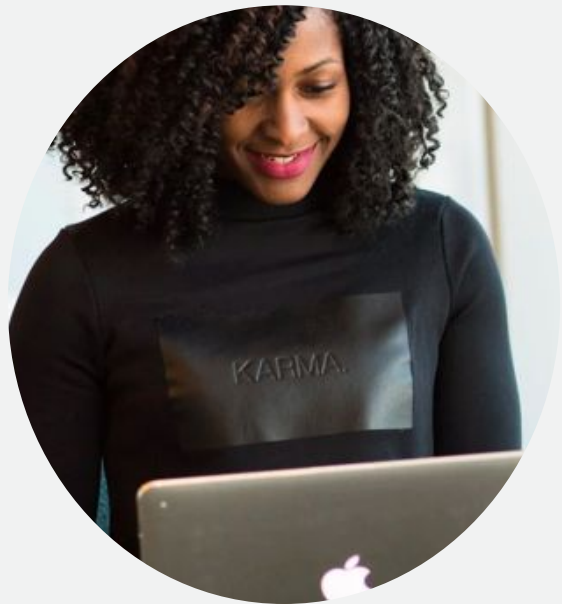


Data Audits and
Hygiene Best
Practices

Maintaining clean, trusted data through effective data audits and hygiene practices is essential for driving informed decision-making and achieving business success.

Break the Silos: Aligning Marketing, Fundraising, Programs & Finance

Fundraising



Manual data entry
Limited collaboration

Marketing



Misaligned KPIs
Multi-system chaos

Program



Siloed from Fundraising
Lack of Transparency

Finance/IT

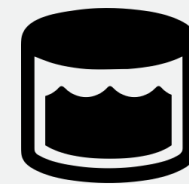


Backlogged
Lack of visibility

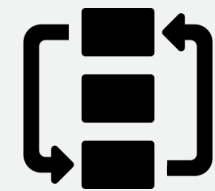
BREAKING THE SILOS



Align marketing,
fundraising, and
programs



Use integrated tools
for shared donor
insights



Embrace change
and adapt to chaos

By aligning teams, integrating tools, and embracing adaptability, organizations can break down silos and strengthen the connections that are essential for driving impact.

Right Message, Right Time

Optimizing Donor Engagement

**“TIMING IS THE ESSENCE OF
SUCCESS IN RELATIONSHIPS AND
FUNDRAISING.”**



[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

Richard Branson

DONOR JOURNEY STAGES

AWARENESS

Potential donors become aware of your organization, its mission, and the impact it makes through marketing, outreach, and word-of-mouth.

CULTIVATION

You nurture the relationship with potential donors, providing them with information, updates, and opportunities to engage with your organization.

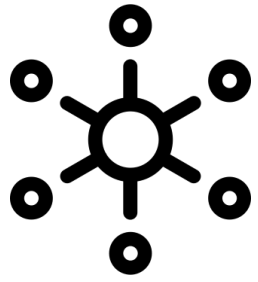
SOLICITATION

You make a formal request for a donation, whether through a direct ask, a fundraising campaign, or a grant proposal.

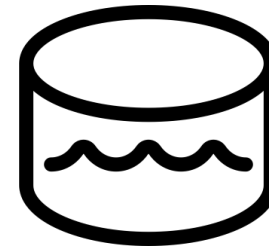
STEWARDSHIP

You maintain a strong relationship with your donors, acknowledging their contributions, providing updates on how their donations are being used, and offering opportunities for further engagement.

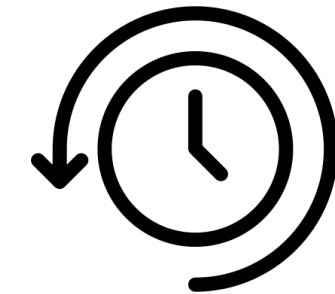
DONOR JOURNEY AUTOMATION



Meet Donors
Where They Are



Leverage
Behavioral Data



Optimize
Outreach Timing

By meeting donors where they are and using behavioral data to trigger personalized outreach, you can create a seamless and engaging journey that cultivates long-term relationships and drives increased support.

MAPPING THE DONOR JOURNEY



Gather the team and start brainstorming all the different touchpoints a donor might have with your organization, from initial awareness to making a donation and beyond.

As a group, start sketching out a visual representation of the donor journey, highlighting the key stages and interactions donors have with your nonprofit.

Discuss the donor journey and identify any areas where you could improve the experience, increase engagement, or encourage repeat donations.

Review the donor journey map and decide which opportunities to focus on first. Develop an action plan to enhance the donor experience.

Personalization That Scales: Balancing the human touch and AI Efficiency

INSIGHT:

PERSONALIZATION THAT FEELS HUMAN

Personalization should feel genuine and intuitive, not robotic or impersonal. The donor experience should strike a balance between technological advancements and maintaining a human touch, creating a personalized interaction that feels authentic and meaningful.

**MODERN FUNDRAISING
REQUIRES AI-EMPOWERMENT**

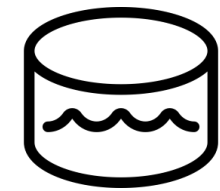
KEY POINTS



Leveraging AI for
Predictive
Personalization



Showcasing Scalable
Personalization Case
Studies



Optimizing User
Engagement and
Conversion Rates

By focusing on leveraging AI for predictive personalization and showcasing scalable personalization case studies, you will be able to focus on strategies to enhance the donor experience and drive sustainable growth.

MODERN FUNDRAISING REQUIRES MORE...

COPYWRITING

CREATIVE

CHANNELS

**DATA &
ANALYTICS**

**AUTOMATION &
TECHNOLOGY**

**STRATEGY &
EXECUTION**

MODERN FUNDRAISING REQUIRES MORE...

MODERN FUNDRAISING

COPYWRITING

CREATIVE

CHANNELS

REQUIRES MORE

DATA &
ANALYTICS

AUTOMATION &
TECHNOLOGY

STRATEGY &
EXECUTION

MODERN FUNDRAISING REQUIRES MORE...

MODERN FUNDRAISING

COPYWRITING

CREATIVE

CHANNELS

REQUIRES MORE

TO BE DONE FOR YOU

DATA &
ANALYTICS

AUTOMATION &
TECHNOLOGY

STRATEGY &
EXECUTION

Ways to Measure Retention

**“IMPROVING DONOR RETENTION
BY JUST 10% CAN DOUBLE THE
LIFETIME VALUE OF YOUR DONOR
DATABASE!”**



Dr. Adrian Sargeant

TOTAL
SAVINGS:

\$456,349

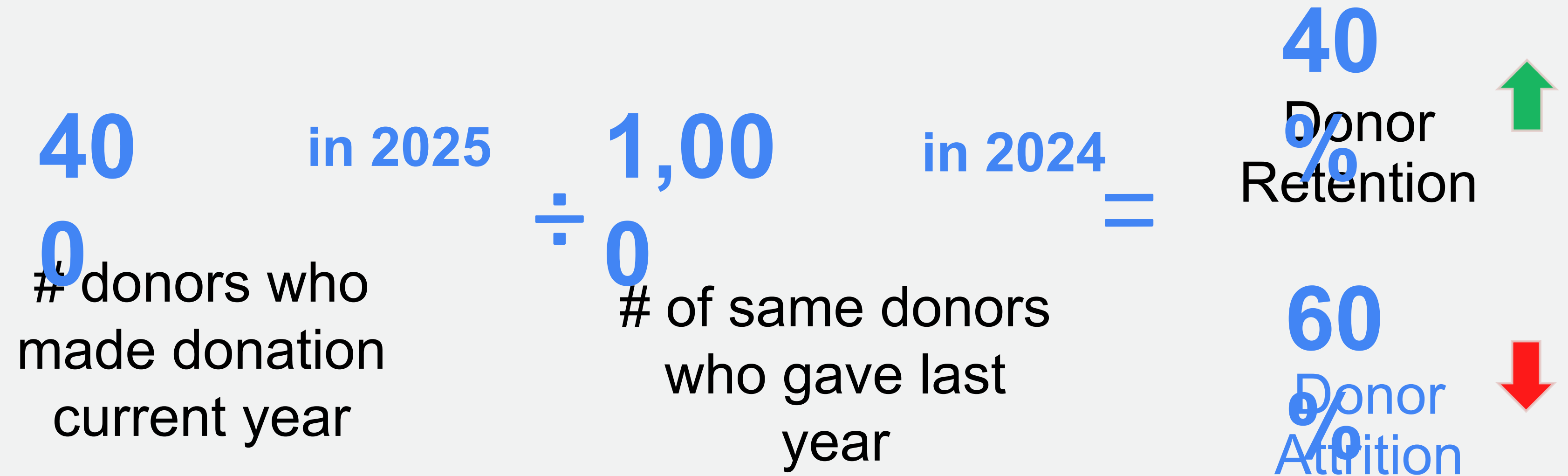
Original Retention Rate: 41% Improved Retention Rate: 51%

Year	Donors	Avg. Gift*	Total	Year	Donors	Avg. Gift*	Total
Start	5,000	\$ 200.00		Start	5,000	\$ 200.00	
2	2,050	\$ 220.00	\$ 451,000	2	2,550	\$ 220.00	\$ 561,000
3	841	\$ 242.00	\$ 203,401	3	1,301	\$ 242.00	\$ 314,721
4	345	\$ 266.20	\$ 91,734	4	663	\$ 266.20	\$ 176,558
5	141	\$ 292.82	\$ 41,372	5	338	\$ 292.82	\$ 99,049
6	58	\$ 322.10	\$ 18,659	6	173	\$ 322.10	\$ 55,567
7	24	\$ 354.31	\$ 8,415	7	88	\$ 354.31	\$ 31,173
8	10	\$ 389.74	\$ 3,795	8	45	\$ 389.74	\$ 17,488
9	4	\$ 428.72	\$ 1,712	9	23	\$ 428.72	\$ 9,811
10	2	\$ 471.59	\$ 772	10	12	\$ 471.59	\$ 5,504
11	—	—	—	11	6	\$ 518.75	\$ 3,088
12	—	—	—	12	3	\$ 570.62	\$ 1,732
13	—	—	—	13	2	\$ 627.69	\$ 972
14	—	—	—	14	1	\$ 690.45	\$ 545

Grand Total from Original Donors: **\$ 820,859**

Grand Total from Original Donors: **\$ 1,277,208**

How many donors are you keeping?



How many are making a second gift?

$$\begin{array}{rcl} \# \text{ First-time Donors Giving 2nd Gift} & 1 & \\ \div & 4 & \\ \# \text{ First-time Donors} & & \\ \hline \text{First-time Donor Retention Rate (\%)} & = & 25\% \end{array}$$

2 Keys to Donor Retention

“Donors don’t give to institutions. They invest in ideas and people in whom they believe.” GT Smith

**“FUNDRAISING
UNDER-PERFORMANCE,
THEREFORE IS ACTUALLY A
FAILURE TO COMMUNICATE.”**



Penelope Burk

#1 Build A Plan for Meaningful Donor Communications



Prompt, meaningful gift acknowledgment

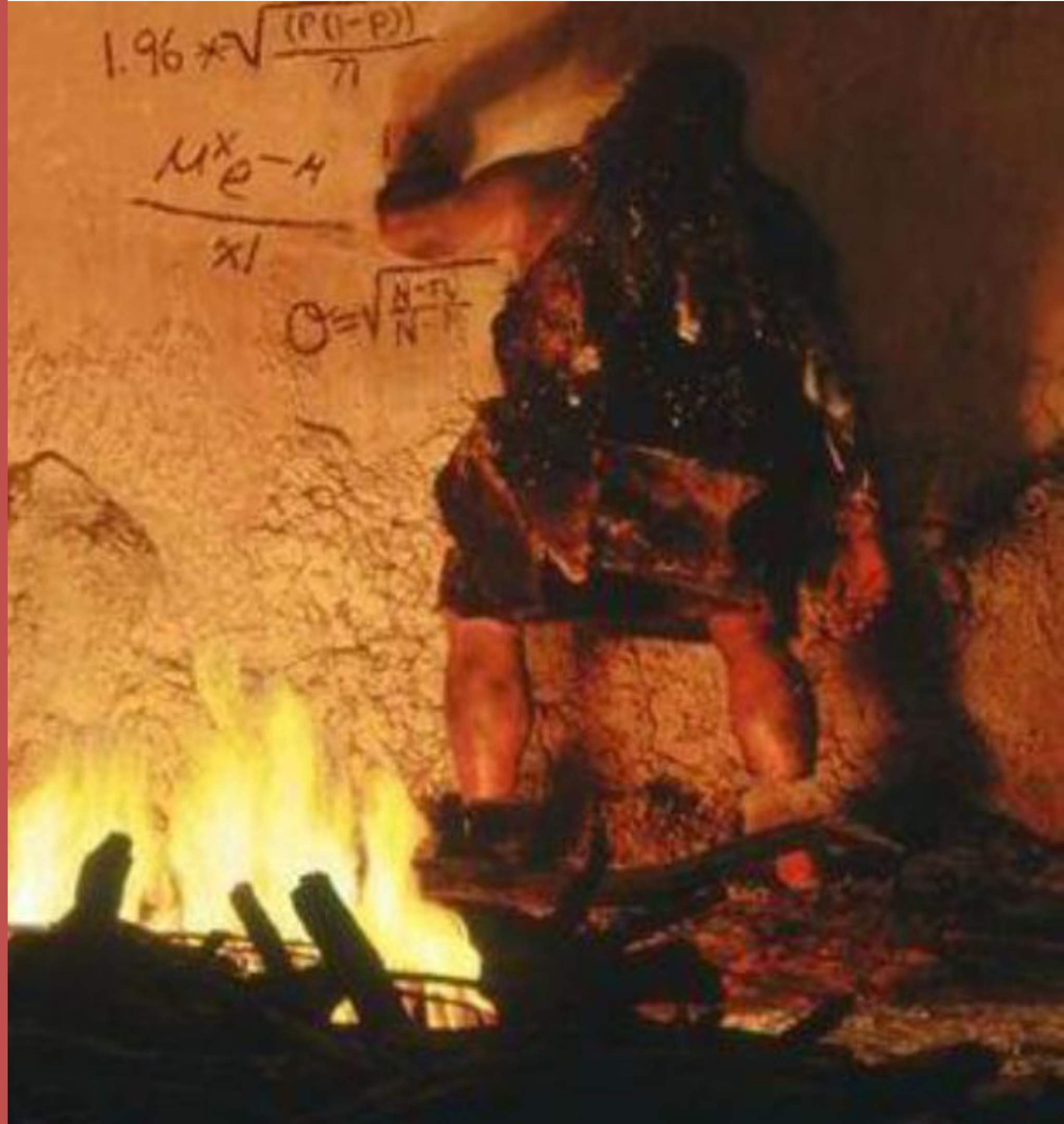


Designation of gift to a program, service or project more narrow in scope than the charity's overall mandate



Measurable results on the last gift before being asked for another one

Use Stories to Show Impact



The Golden Circle

WHAT

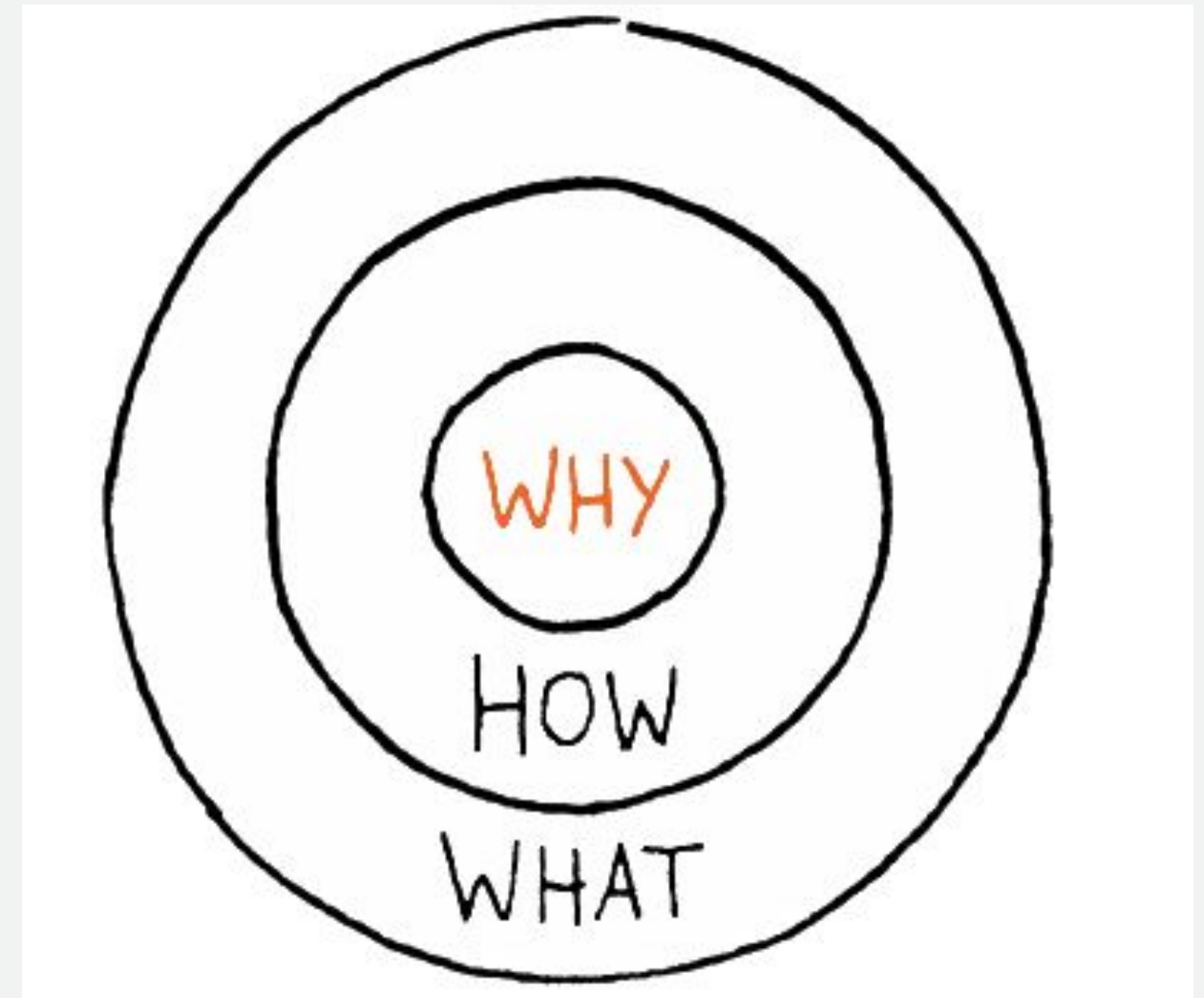
Every organization on the planet knows WHAT they do. These are products they sell or the services they offer.

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.



Create a Multi-Channel Personalized Approach





Boards Influence Donor Retention

93

They would “definitely or
probably give again the
next time they were
asked”

84

They would “make a
larger gift.”

74

They would “continue
giving indefinitely”

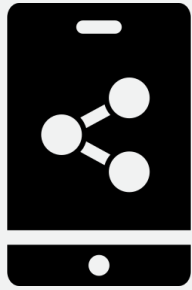
**Speak to the Person,
Not the Wallet**



Donors: Humans, Not Transactions

Donors are not mere sources of financial transactions, but rather individuals with unique passions, interests, and motivations. Understanding the human element behind each donation is crucial for building meaningful and long-lasting relationships with supporters.

KEY STRATEGIES



Crafting Messaging
Aligned to Donor
Passions



Segmentation
Strategies that
Resonate



Donor Segmentation
Exercise

By implementing these key strategies, your organization can effectively craft messaging, segment donors, and engage them in a meaningful and impactful way, ultimately driving increased donor loyalty and support.

CRAFTING DONOR-CENTRIC MESSAGING

Understand Your Donor Base

Conduct research to deeply understand the unique passions, interests, and motivations of your donor base. Tailor your messaging to resonate with their individual giving preferences.

Align Messaging to Donor Interests

Craft your messaging to clearly demonstrate how their donations will make a meaningful impact on the causes they care about. Avoid generic, transactional appeals.

Highlight Donor Impact

Showcase how donor contributions have tangibly improved lives and driven positive change. Share powerful stories that inspire donors to continue their support.

Foster Ongoing Engagement

Maintain regular communication with donors, providing updates and opportunities for further involvement. Build lasting relationships beyond just fundraising.

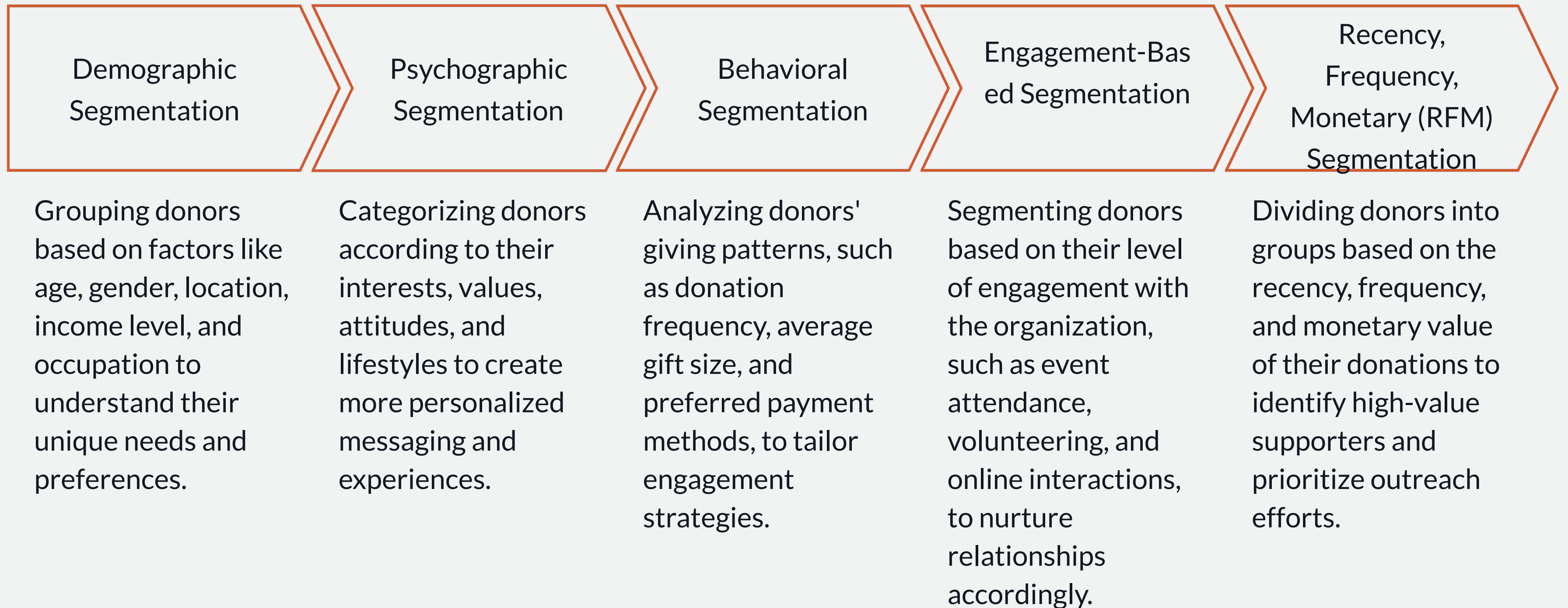
Personalize the Donor Experience

Leverage data and technology to personalize outreach, acknowledging each donor's unique history and demonstrated interests with your organization.

Cultivate a Donor-Centric Culture

Ensure your entire team is committed to understanding and meeting the needs of your donor base. Foster a culture of gratitude and responsiveness.

DONOR SEGMENTATION STRATEGIES



#2 Prioritize & Get to Know Your Donor Segments



1. Current Donors

- Largest over their lifetime as donors
- Longest donors
- Lower-level donors who have deeper capacity

2. New Donors

- Largest New donors
- Potential capacity
- Passion for organization

3. Lapsed Donors

- Length of giving
- Cumulative Giving to you
- Screened capacity



All

Images

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News

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Books

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Tools

AI Overview

Learn more

Here are some strategies for retaining donors:

- Thank donors: Donors are more likely to donate again if they are thanked within 48 hours of making a gift.
- Be personal: One-on-one calls can be effective for saving at-risk donors.
- Be transparent: Donors want to know how their donations are being used.
- Analyze donor data: Donor management software can help identify trends and effective outreach methods.
- Deepen donor relationships: The more engaged donors are, the more likely they are to stay on board.
- Ask for feedback: Donors appreciate when their input is valued and changes are made based on their feedback.
- Encourage recurring donations: This can help maintain a stable revenue stream and save time and resources spent on soliciting new donors.
- Create donor spotlights: Email newsletters can feature people who have made special contributions to the organization.

Donor Retention: Step-by-Step Guide to Retain More Support - Dataro

Aug 18, 2021 — Additional Donor Retention Strategies. ... Be personal with your outreach. One-on-one calls have proven to...

Dataro

7 Ways to Increase Nonprofit Donor Engagement & Retention

Jan 11, 2024 — Donor data is a powerful source of information for donor retention strategy. Donor management software hel...

Nonprofit Megaphone

Donor Stewardship: Expert Tips To Build Strong Relationships

7. Ask donors for feedback. One way to increase donor loyalty is to show donors that you appreciate their input. You can do...

Bloomerang

Show all

Get to Know Your Current Donors



Why Us?



How Was It Making
A Gift?



What Do You Expect
As A Donor?

**“A FIRST DONATION IS NOT
MONEY. IT’S ATTENTION.”**



Tom Ahern

Hold onto First-Time Donors



BOARD



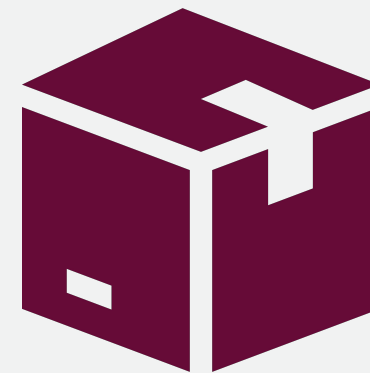
Thank you
call



DEV STAFF



Thank you
Letter



Welcome
Packet



Stewardship
Packet

Hold onto First-Time Donors



Invitation
Tour



Appeal



Ongoing
Communications

Reengage Your Lapsed Donors

Who lapsed?

Were they one-time donors?

Long-time donors who stopped?

Monthly who cancelled?

Why did they stop giving?

Is their info still correct? NCOA and Deceased Suppression to clean list.

Survey to ask their feedback.
“We miss you. What happened?”

Make personal call/email for larger
lapsed donors.

What the research says...

Benchmarks



Welcome to Avid's Benchmarks

The challenge with most nonprofit benchmarks is that they are frozen to a single point in time. Avid aims to provide real-time insights by offering benchmarks that reflect the latest industry trends, updated as recently as last month. If you want to get the most out of Avid (and keep your access to benchmarks), you simply need to keep your giving updated on a monthly basis. (Connecting your CRM is the easiest way to do that.)

[Generate Slides](#)

Filters:

Vertical ▾

Annual Revenue Range ▾

Period Type: Trailing 12 Months ▾

Benchmark Overview

Benchmark by Giving Level



Overall Giving Trends

Many factors influence giving, from an organization's fundraising strategies to broader economic trends. While every nonprofit's data is unique, many are influenced by similar factors, leading to common trends in giving—whether increasing or declining.

Use the filters below to explore how you compare to different verticals or organization sizes.

Percentage Change in Revenue (from previous period)

How has per-organization revenue changed compared to the previous period, based on the current filters?

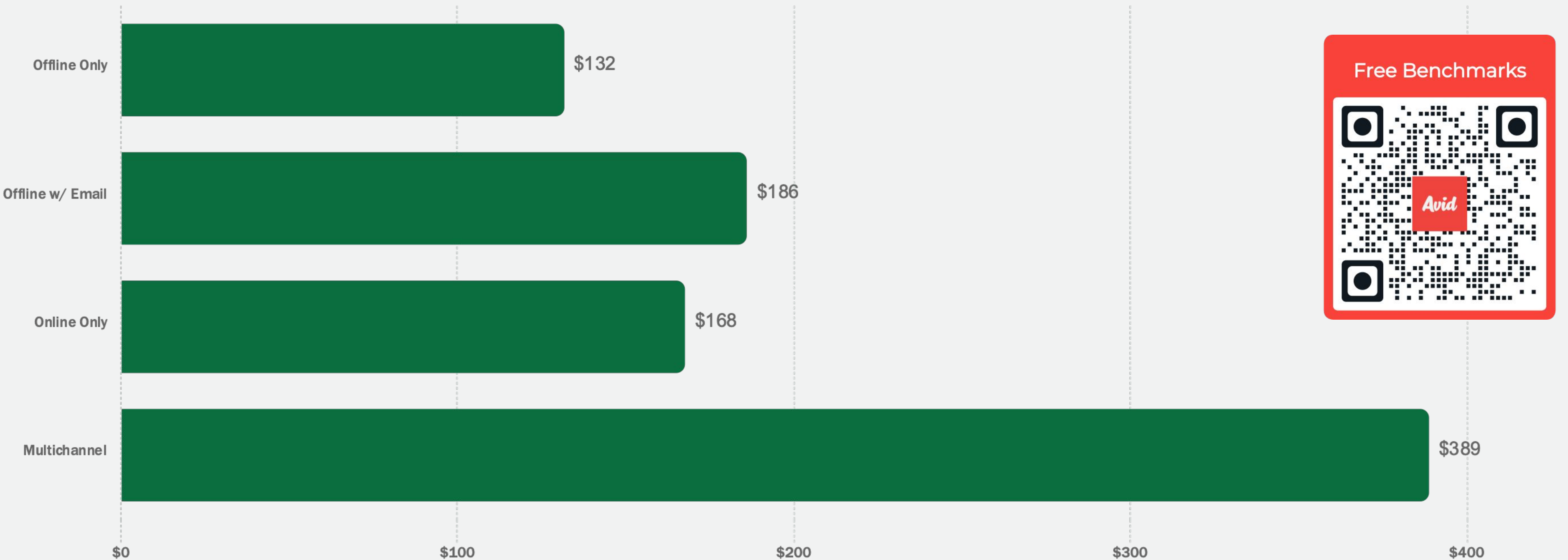


Percentage Change in Active Donors (from previous period)

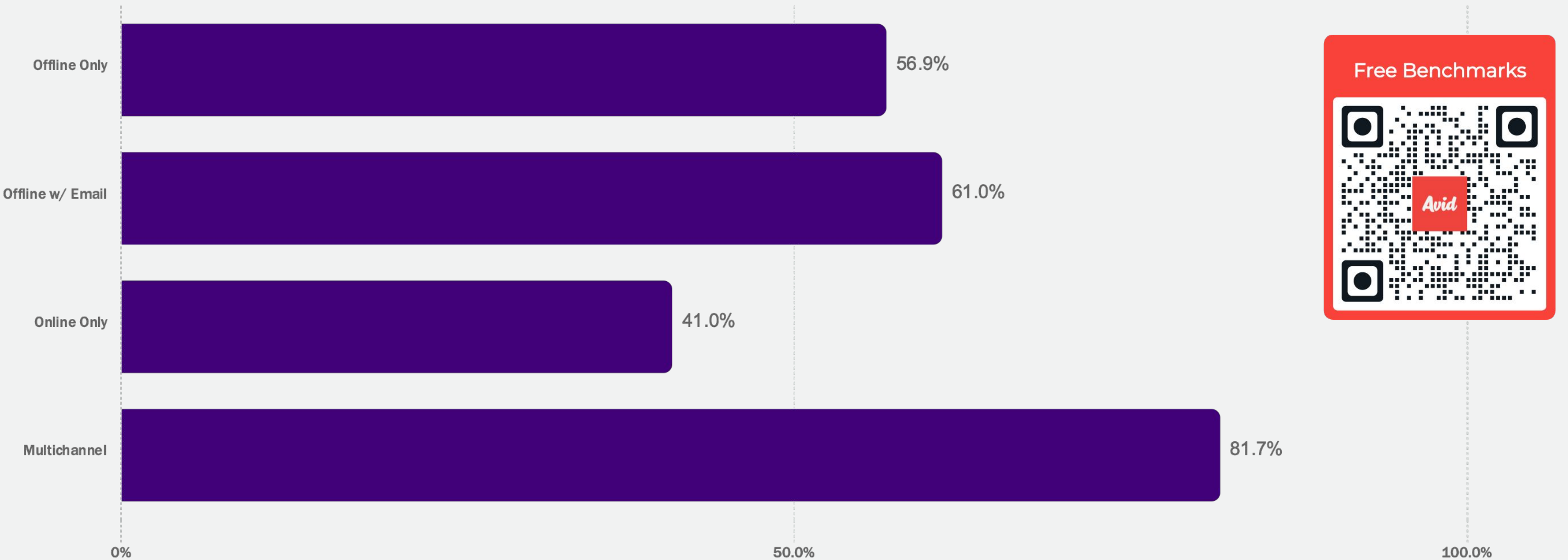
How has the number of active donors changed compared to the previous period, based on the current filters?



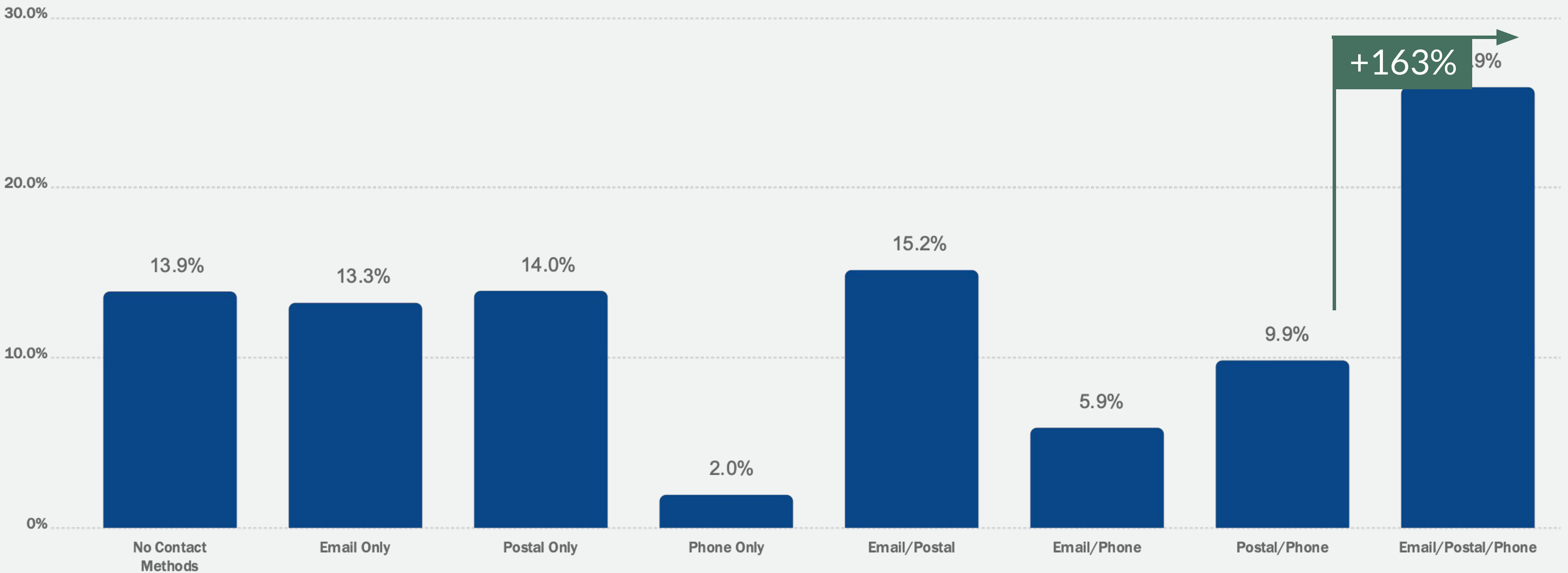
What was the annual revenue per active broadband (<\$1K HPC) donor for each channel cohort?



How likely were active broadbase (<\$1K HPC) donors to retain based on the channels they gave from in the prior period?



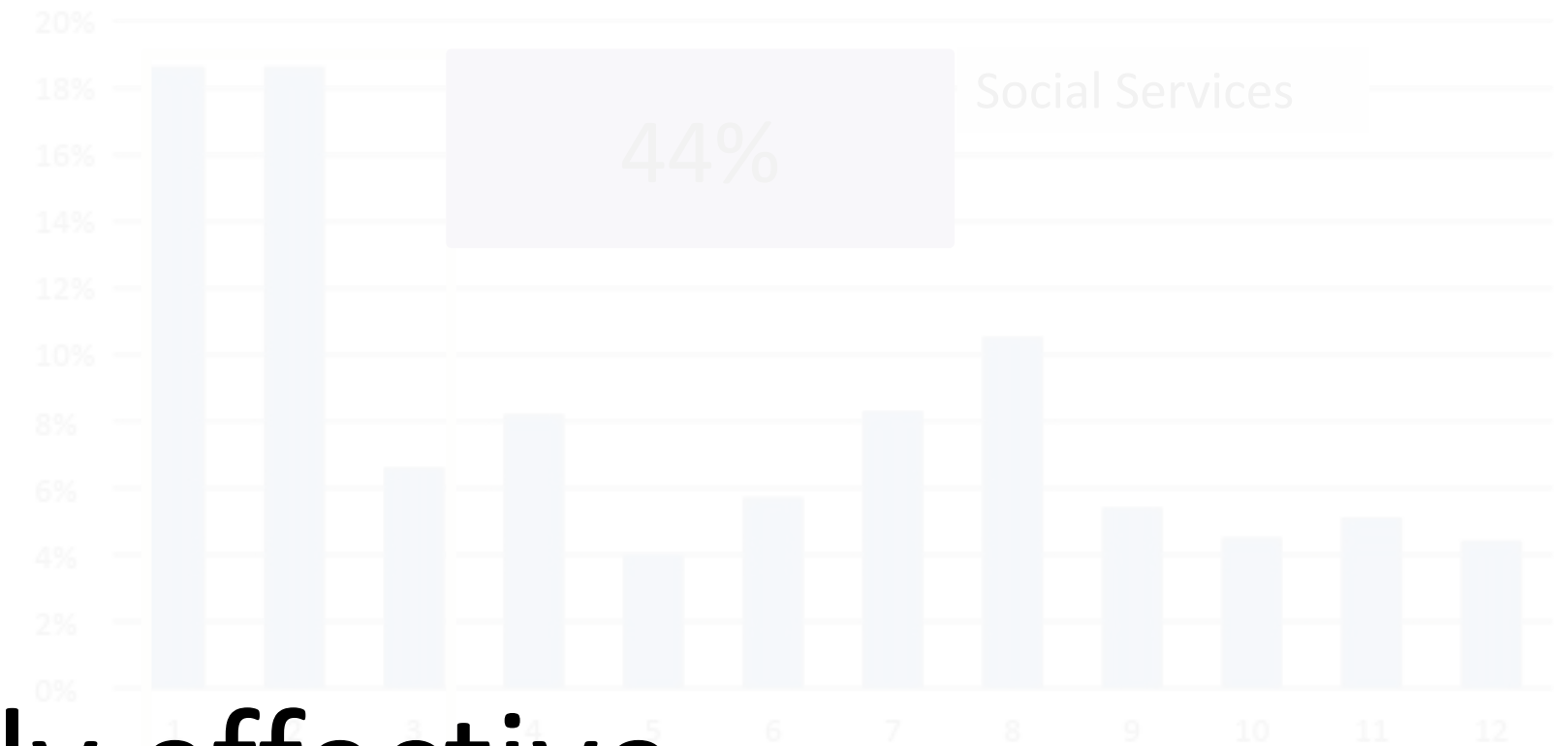
How did the available contact methods affect the annual value of broadbase donors?



There's significant 2nd gift opportunity in a new donor's first 90 days.

You need a highly effective
new donor welcome series.

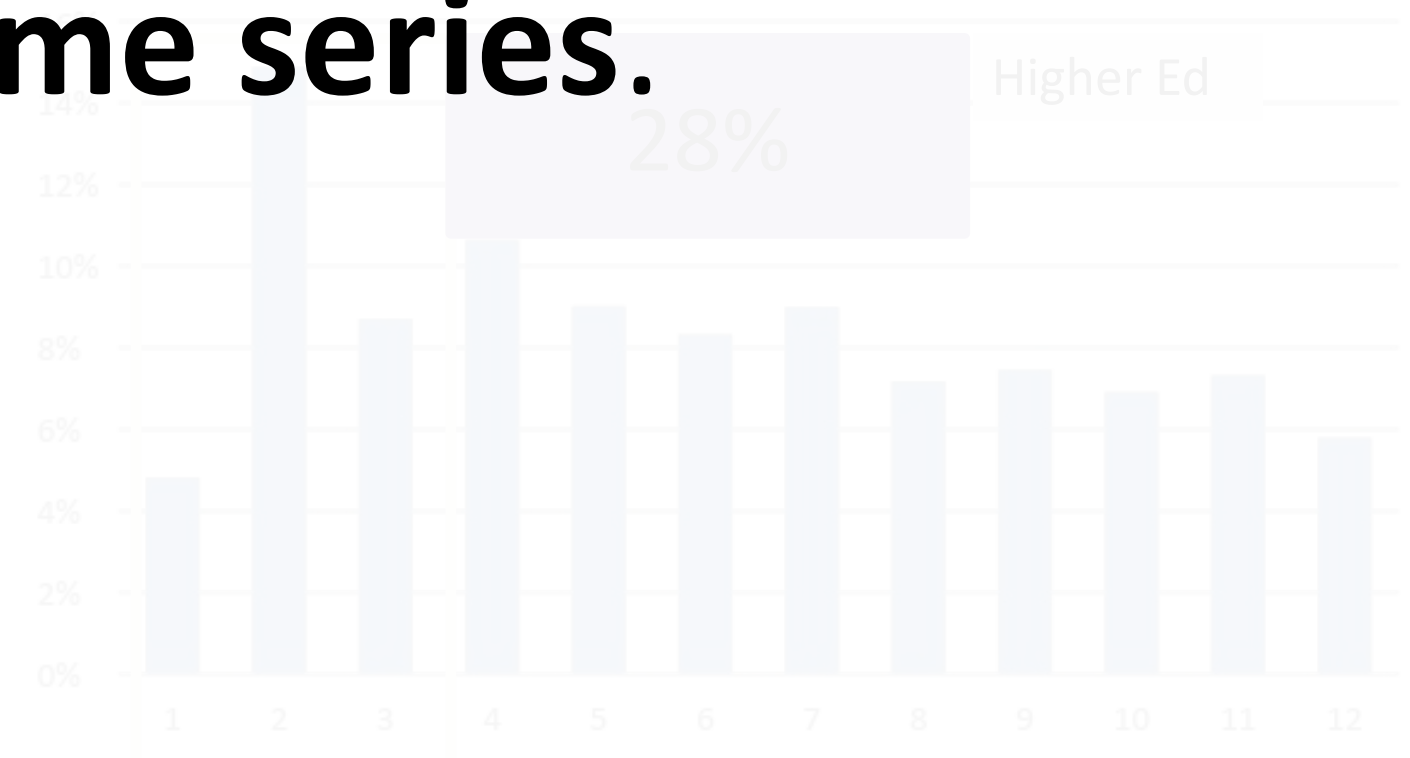
% of 2nd Gifts By Month



% of 2nd Gifts by Month



% of 2nd Gifts by Month



“But I already have one!”



27%
*of organizations **did not send a receipt** within the first 7 days of donating.*



51%

*of organizations **did not send a thank you** within the first 7 days of donating.*



33%

*of organizations **did not send any cultivation** within the first **90 days** of donating.*



51%
of organizations made no attempt to ask for 2nd gift within the first 90 days of donating.

27%

Organizations that **don't send a receipt** within the first 7 days of donating.

51%

Organizations that **don't send thank you** within the first 7 days of donating.

51%

Organizations make **no attempt to win a 2nd gift** within 90 days of donating.

33%

Organizations that **don't send any form of cultivation** within 90 days of donating.

Cliff Notes Summary



Get to know who your donors are—build your annual plan on regular engagement



Develop the discipline of using metrics to guide your performance evaluation



Don't send blanket asks...ever



Segment and personalize your asks to encourage upgraded giving



Sharpen your signal to the lead with your “why”

BUT WAIT.
THERE'S MORE.

Avid

DATA

OUR SYSTEMS ARE IN CHAOS.

DATA

OUR SYSTEMS ARE IN CHAOS.
THEY NEED CLARITY.

STRATEGY

WE'RE STUCK IN SHORT-TERM THINKING.

STRATEGY

WE'RE STUCK IN SHORT-TERM THINKING.
OUR MISSIONS REQUIRE LONG-TERM PLANS.

EXECUTION

WE ARE UNDER-RESOURCED.

EXECUTION

WE ARE UNDER-RESOURCED.
YOU NEED FOCUS & EFFICIENCY.

THE FIX ISN'T A TOOL IT'S A SYSTEM

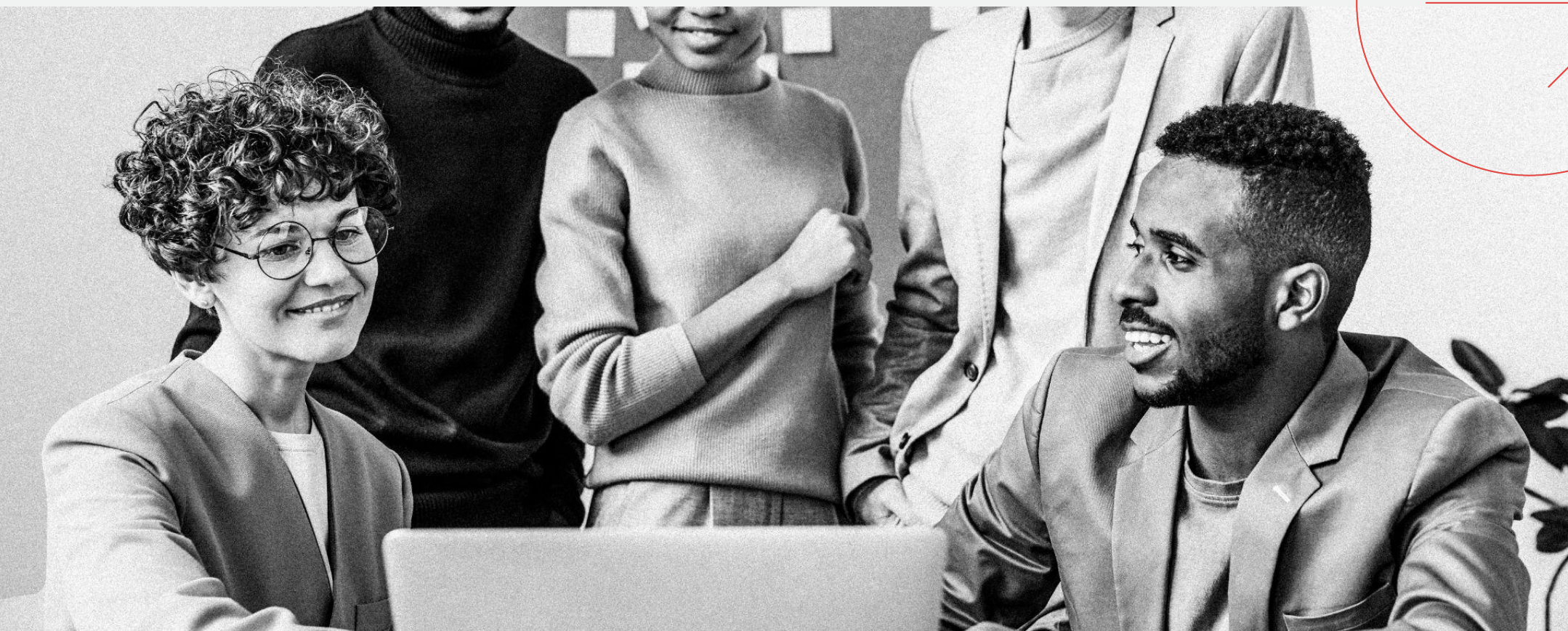
Avid is the first-ever **Fundraising Agency in the Cloud**—built to unify your data, automate your strategy, and execute with precision.



It's not software.

It's not a service.

It's a system—**finally built for how fundraising actually works.**



ALWAYS ON DATA-SYNC

YOUR TOOLS. FINALLY CONNECTED.



ActiveCampaign

Avid integrates with ActiveCampaign to seamlessly sync donor engagement data, enabling automated and personalized email campaigns.



Anedot

Avid connects with Anedot to streamline donation tracking and ensure real-time donor data flows into your fundraising strategy.



BigQuery

With Avid's integration to BigQuery, fundraisers can unify and analyze large-scale donor data for deeper insights and smarter decision-making.



Bloomerang

Avid syncs with Bloomerang to bring donor history and engagement data into one unified system for better retention and fundraising efficiency.



Constant Contact

Integrate Constant Contact with Avid to bring your email marketing into your unified system. Keep lists synced, launch targeted campaigns, and track engagement without the manual lift.



DonorPerfect

Avid enhances DonorPerfect by pulling in donor records and giving history to optimize segmentation and campaign execution.



Facebook

Avid automatically captures and syncs Facebook Lead Ads data, enabling real-time donor acquisition and engagement.



FundraiseUp

Connect with FundraiseUp to unify your donation data with the rest of your stack. Track giving behavior, sync donor records, and fuel smarter, automated campaigns across channels.



Google Ads

Avid's integration with Google Ads ensures targeted donor outreach by dynamically syncing audiences for optimized ad spend and engagement.



ALWAYS ON DATA-SYNC

YOUR TOOLS. FINALLY CONNECTED.



Marketo

Avid's Marketo integration enables fundraisers to automate personalized donor journeys and drive engagement at scale.



NationBuilder

Avid integrates with NationBuilder to unify donor and supporter data, optimizing outreach and engagement strategies.



Neon One

Avid syncs with Neon One to streamline donor data, automate segmentation, and execute high-impact fundraising campaigns.



Pardot

Avid's integration with Pardot enables automated donor nurturing and targeted fundraising communications.



QuickBooks

Avid integrates with QuickBooks to track and reconcile fundraising revenue, ensuring financial accuracy and transparency.



RaiseDonors

Avid enhances RaiseDonors by unifying donor data and providing insights to optimize online giving strategies.



Raiser's Edge NXT

Avid connects with Raiser's Edge NXT to surface insights, automate donor engagement, and streamline fundraising efforts.



Salesforce

Avid integrates deeply with Salesforce to unify donor data, provide predictive insights, and power data-driven fundraising strategies.



SendGrid

Avid's SendGrid integration enables automated, personalized donor communications with real-time data syncing.



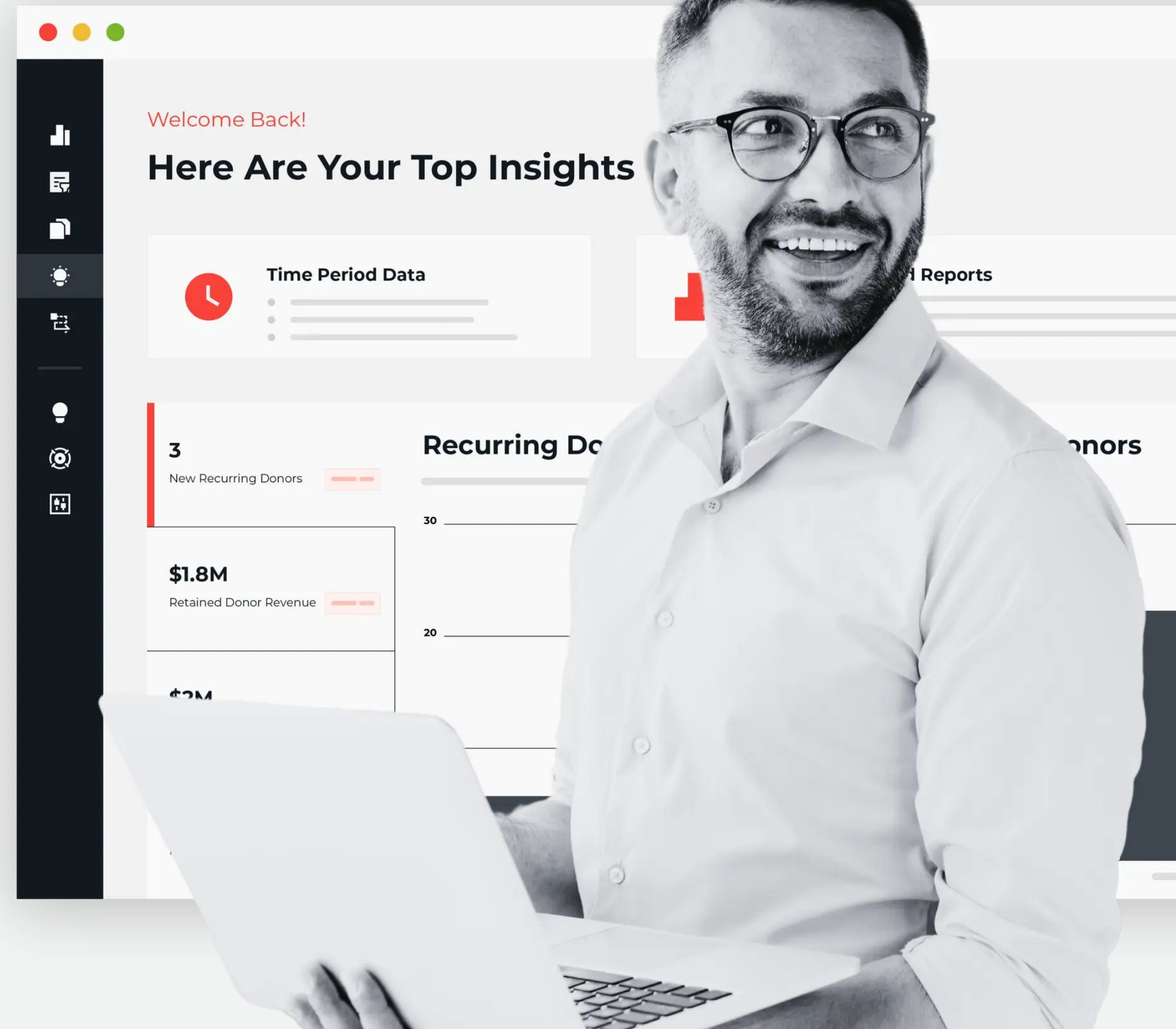
Virtuous CRM

Avid enhances Virtuous CRM by leveraging donor data for automated segmentation, engagement, and fundraising optimization.

AND MORE!

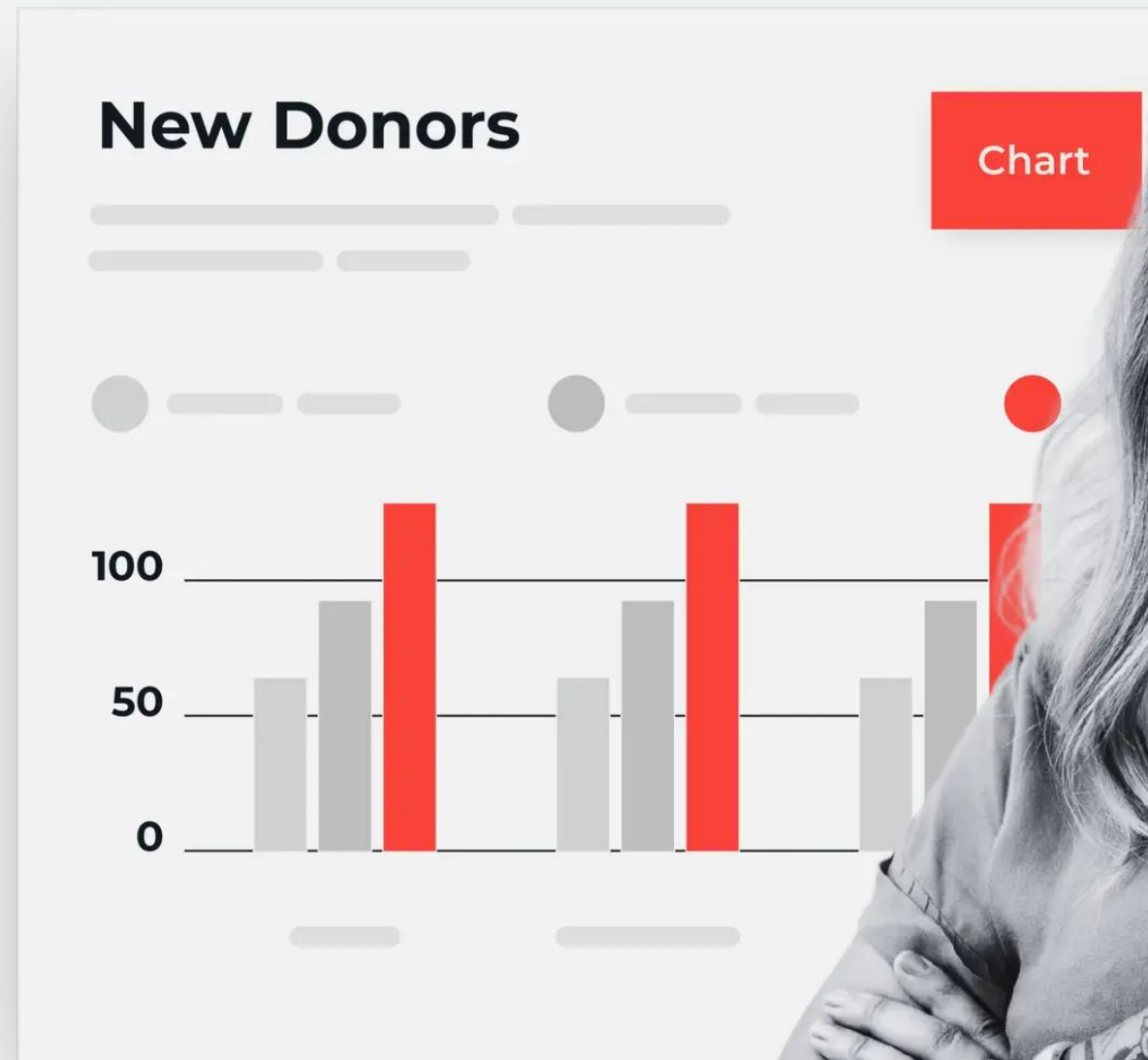
FUNDRAISING INTELLIGENCE

KNOW YOUR NEXT
MOVE, **INSTANTLY.**



AI-POWERED PLAYBOOKS

CAMPAIGNS THAT BUILD THEMSELVES.



THE AI-ENABLED FUNDRAISING TEAM

See how today's top fundraising teams are **using AI to move faster**, cut manual work, and raise more—with fewer resources.

The AI-Enabled Fundraising Team

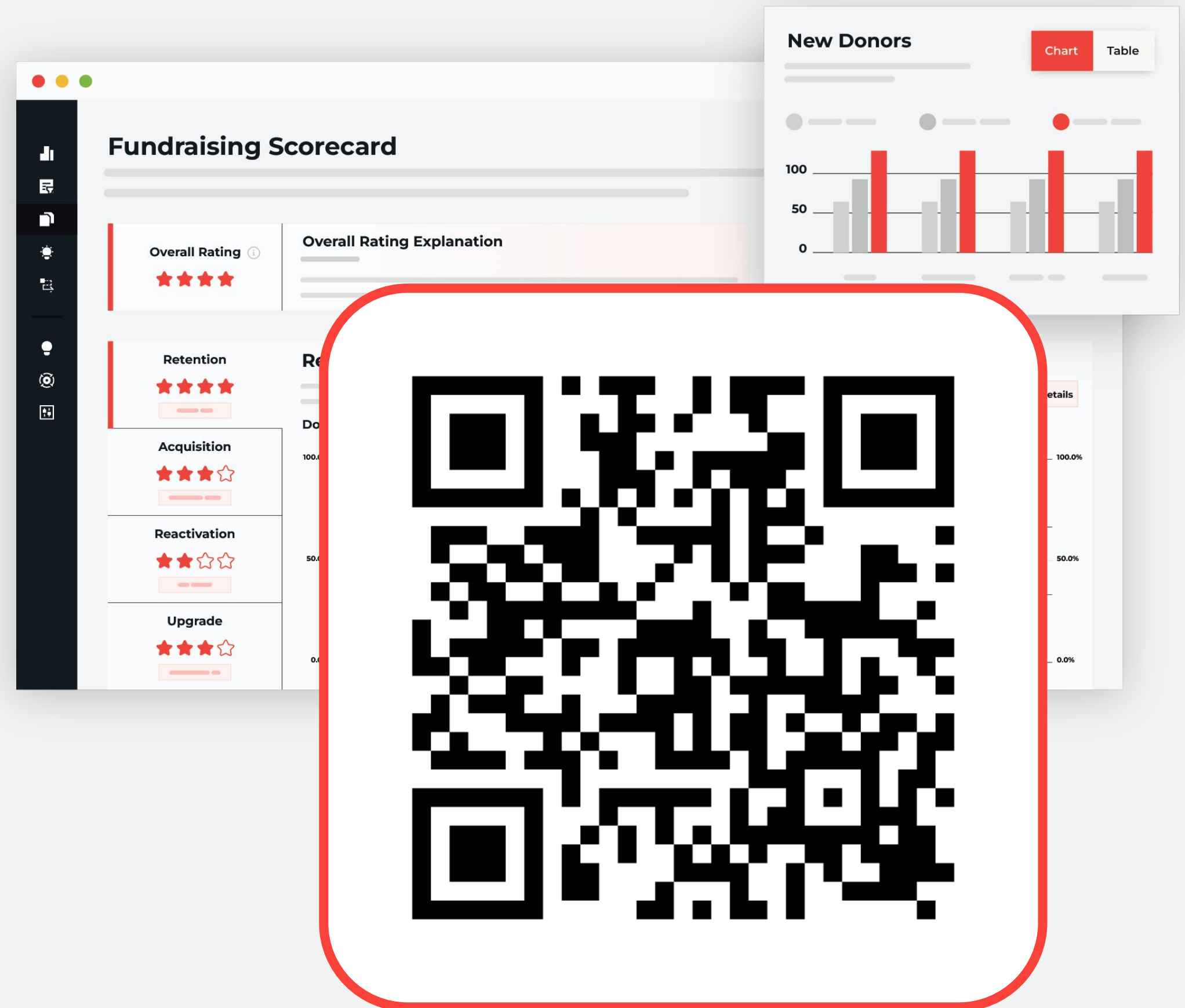
Raise More in Less Time with a Better ROI



Avid

SCHEDULE YOUR DEMO OF AVID

See how Avid can help you **unify donor data**, eliminate guesswork, and **execute fundraising strategies** with confidence.

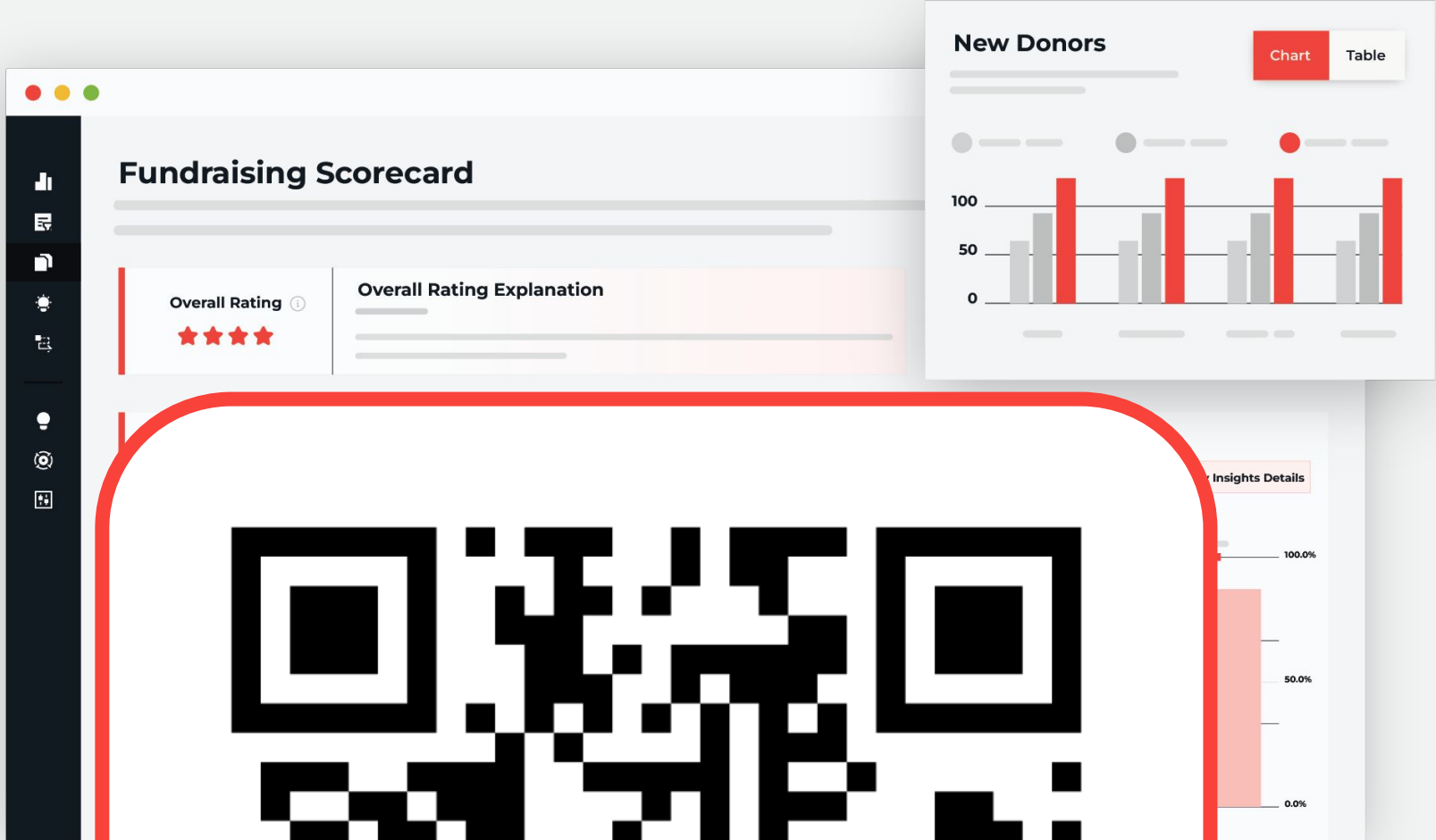


The AI-Enabled
Fundraising Team

Raise More in Less Time with a Better ROI



EBOOK



DEMO

Avid

Thank You

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LET'S CONNECT

