

Shaping Donor Journeys for Lasting Engagement



Faircom, a VeraData Partner agency, is an integrated fundraising agency composed of passionate development professionals. We work with your nonprofit team to raise funds at every donor level and through every channel of giving.

Whatever you do, we raise the funds to help you do it.

- » Donor Acquisition
- » Donor Renewal
- » Lapsed Reengagement
- » Monthly Giving
- » Mid-Level Giving
- » Major Giving
- » Planned Giving



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10 Ways to Build Fundraising Momentum in Any Economy



1 Unlock the potential of employer matching gifts

Many supporters are unaware their employers offer gift matching, but this can significantly amplify revenue at no cost to donors. You can implement a matching gift search tool on your website to make it easy to check eligibility, and spotlighting “match champions” can inspire others to do the same.

2 Forge evergreen connections with recurring visitors

Many supporters are unaware their employers offer gift matching, but this can significantly amplify revenue at no cost to donors. You can implement a matching gift search tool on your website to make it easy to check eligibility, and spotlighting “match champions” can inspire others to do the same.

3 Explore beneficiary designations

Educating donors about naming you as a beneficiary to their retirement accounts, life insurance policies, or donor-advised funds can help you benefit from significant future gifts with minimal effort and zero cost to donors.

4 Prioritize lapsed donor re-engagement

Emotional storytelling or updates on past contributions can rekindle interest from previous donors. Cast a wide net across your lapsed audience to benefit from the less costly reach of digital channels, using tools like automated email series to systematically reconnect.

5 Create targeted re-engagement journeys

Absorb donors into a lower, yet more sustainable donation tier if they aren't able to continue giving at a higher level, like having stagnant major donors land in a strong mid-level program. This offers a great opportunity to re-engage with donors who have historical interest and known capacity to give.

6 Optimize donation page experiences

Continuously test elements of your donation page to improve user experience and boost conversions. Experiment with different ask arrays for general versus campaign-specific forms, and tailor messaging based on whether you're acquiring new donors or deepening engagement with current supporters.

7 Promote planned giving as a pledge challenge

You can incentivize legacy gift prospects with a matching contribution per declared bequest intention – e.g., major donor and/or board member gift of \$5,000 per pledge. This increases known commitments and helps you confirm and track pledges.

8 Highlight tax-efficient giving options

Help donors maximize their impact by donating appreciated assets. They can avoid capital gains tax while deducting fair market value. Clearly outline the process for stock and crypto gifts on your website, and regularly remind donors of this option, as many may not realize that you're equipped to accept these contributions.

9 Regularly communicate to cultivate relationships

Consistent communication keeps donors connected to your mission and aware of the impact. Use impact reports and donor stories to show the real-world results of their giving, keeping your work top of mind and reinforcing their decision to support you.

10 Lean into long-term initiatives + messaging

Sustaining donors are loyal by nature – honor that commitment by communicating the lasting community impact their support enables. Sharing your long-term goals reinforces the case for their continued investment, driving stronger retention and potential upgrades over time.

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11 Tips for Alternative Giving Success



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11 Tips for Alternative Giving Success

1 Maximize donor-advised fund (DAF) visibility.

DAFs – charitable giving accounts – are growing in popularity, and it's essential to include DAF giving options in all communications and provide clear instructions with your tax ID on your website. This can expand your share of a donor's charitable giving wallet and identify prospects for larger gifts. Consider targeted campaigns to DAF donors, highlighting the ease and benefits of giving through their fund.

2 Leverage IRA qualified charitable distributions (QCDs).

QCDs allow donors aged 70½ or older to make tax-free gifts up to \$105,000 annually from their IRAs, satisfying required minimum distributions without increasing taxable income. Educate eligible donors about this tax-efficient giving option through targeted communications like postcards. Develop a dedicated landing page with clear QCD instructions and FAQs to simplify the process and highlight the unique tax advantages for donors.

3 Promote tax-efficient stock and cryptocurrency donations.

Emphasize how donors can avoid capital gains tax by donating appreciated assets while deducting the fair market value. Clearly outline the process for stock and crypto gifts on your website, and consider partnering with platforms that simplify these transactions. Regularly remind donors of this option in your communications, because donors may be unsure that you are ready and able to accept these contributions.

4 Foster a culture of legacy giving.

Legacy gifts present a significant opportunity, because nearly 90% of wealth is held in assets, much of which isn't transferred until after someone passes away. Start "planting the seed" early and often, as these gifts can take years to mature, through simple, clear materials explaining options like bequests. And, leverage key moments – like National Make a Will Month in August – to capture donor attention.

5 Unlock the potential of employer matching gifts.

These external matches can significantly amplify donations at no extra cost to donors. Educate supporters about this opportunity in all communications, as many are unaware their employers offer match programs. You can also implement a matching gift search tool on your website to make it easy for donors to check their eligibility, and spotlighting "match champions" can inspire others with their enhanced impact.

6 Harness the power of peer-to-peer fundraising.

Empower supporters to create personal fundraising pages for your cause – providing them with compelling stories, images, and impact data to share. This helps bring new supporters through the door through the power of peer referrals. Consider launching time-limited campaigns, like Giving Day challenges, to boost engagement, and offer incentives or recognition for top fundraisers.

7 Explore beneficiary designations.

Start a conversation by asking, "Did you know you can designate our organization as a beneficiary?" Educate donors about naming you as a primary or contingent beneficiary to their retirement accounts or life insurance policies – enabling your programs to benefit from assets remaining after the donor passes. This can lead to significant future gifts with minimal current effort from and zero cost to donors.

8 Implement a robust, targeted gifts-in-kind program.

Sometimes donors wish to give an item rather than cash, but you can shape what is received by creating and prominently displaying a "wish list" of needed items on your website. Develop partnerships with businesses or schools for regular in-kind donation drives, and ensure you have efficient systems for receiving, tracking, and acknowledging these gifts.

9 Leverage fundraising apps to engage younger donors.

Explore innovative platforms that resonate with next-generation supporters, including apps with gamification elements, social sharing features, and seamless mobile experiences. These tools can make giving fun and accessible, meeting younger donors where they're most comfortable while providing valuable data and a future pipeline to feed your fundraising.

10 Optimize your website for alternative giving.

Ensure your website presents all alternative giving options in an easy-to-navigate format. Create dedicated landing pages for each giving method with clear instructions, FAQs, and direct contact information for personalized assistance. The latter is especially critical for personalized relationship development around significant giving decisions like legacy gifts, or to build one-to-one dialogue with high-value prospects.

11 Recognize donors for their full impact.

Implement a system to match back all contributions to donors, including soft credits for indirect gifts. This approach ensures you can recognize and celebrate donors for their total impact, even when gifts come through channels like employer matches or donor-advised funds. By acknowledging the full scope of a donor's support, you deepen relationships and encourage continued engagement across various giving methods.

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11 Tips for Digital Fundraising Success

1 Forge evergreen connections with recurring visitors.

Continually re-engage site visitors who showed interest but did not act through targeted remarketing campaigns that remind them why they care. **Three top focus areas are: remarketing to re-engage interested visitors, promote monthly giving for sustainable revenue, and maintain strong brand awareness across all platforms.**

2 Leverage cost-effective personalization in email communications.

Segmentation in digital channels is often easier and less costly than print – and you can enhance donor engagement by using email platform tools to send customized messages and offers. Employ techniques like conditional fields and automated journeys to deliver relevant content that resonates with each donor's interests and past interactions.

3 Prioritize lapsed donor re-engagement.

Use emotional storytelling or updates on past contributions to rekindle interest from previous donors, casting a wide net across your lapsed audience given the less costly reach of digital channels. **Consider setting up an automated email series to systematically reach out to and reconnect with them. systematically reach out and reconnect with them.**

4 Reignite interest among dormant subscribers.

Reactivate subscribers who are currently inactive with a compelling automated re-engagement campaign, for example including opportunities like a short engaging quiz, limited time match offer, and “we miss you” language woven throughout, to nudge them to reactivate before you decide to archive their contact

5 Remind donors of your gratitude – and ask for their input!

Look outside of giving when interacting with your donors. Regularly engage with both one-time and monthly donors to gather feedback so you better understand their needs, concerns, and suggestions. Always express gratitude following a campaign and send cultivation emails at least once a month. Such ongoing dialogue is crucial for maintaining engagement and satisfaction with your organization's efforts and impact.

6 Optimize donation page experiences.

Continuously test various elements of your donation page to enhance user experience and increase conversions. **This includes testing different ask arrays for general versus campaign-specific donation forms, and tailoring messaging to attract new donors versus engaging current donors.**

7 Gamify interactions to create incentives and a sense of fun with donors.

Introduce elements of gamification in your digital outreach, such as challenges, badges, or leaderboards to encourage more frequent and/or higher donations. Creating a sense of competition and achievement can compel interaction while simultaneously showcasing a broader community of supporters.

8 Prioritize email address collection over outright giving, especially at key times.

Ongoing collection of first-party data is essential to offset upcoming cookie depreciation issues. Some ideas to boost your efforts include using a lightbox for email collection during off-peak fundraising moments, running evergreen Meta Lead Generation campaigns, and asking for emails on direct mail packages and at events.

9 Integrate social proof to remind donors they are part of a movement for change.

Display testimonials, donor stories, and statistics on your website and in campaigns to showcase to donors that they are not alone in supporting your mission – they stand with other committed partners too! Social proof can significantly influence potential donors' actions, particularly as it helps build trust and perceived credibility.

10 Improve SEO for greater visibility.

Ongoing SEO efforts are essential for nonprofits to continually improve their online visibility, attract more supporters and donors, and drive engagement with their mission and initiatives. Refreshing content and posting regularly on your website are key drivers in boosting website traffic and revenue. Additionally, you should incorporate key search terms in your blogs and pages to align with what your donors and prospects are using on search engines.

11 Focus on mobile user experience.

Ensure your digital fundraising platforms are fully optimized for mobile users. With an increasing number of donors accessing information via smartphones, mobile-friendly design is essential for maximizing engagement and ease of giving. This includes streamlined forms and email marketing formats, fast loading times, and responsive web design that adapts to various screen sizes.

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11 Tips for Planned Giving Success



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11 Tips for Planned Giving Success

1 Planned giving is essential to the health of a nonprofit.

Only 5% of the nation's wealth is in cash, and the other 95% is in property and stock. This means that failing to promote planned giving leaves valuable potential revenue untapped.

2 Legacy giving grows your annual fund income.

Studies show that a donor who includes an organization in their estate plans also increases their outright gift by about 75% – and this stays up!

3 Not all planned gifts are from seniors.

About 45% of bequest commitments are created to individuals under 55 – and 15% of those are made by people under 45. You need to consistently be reaching donors of all ages with a message of legacy giving.

4 Promote planned giving as a pledge challenge.

You can incentivize legacy gift prospects with a matching contribution per declared bequest intention – e.g., major donor and/or board member gift of \$5,000 per pledge. This increases pledges and helps you confirm and track pledges.

5 Use surveys to understand donor interests and guide them to the importance of a legacy gift.

Survey packages and emails are designed to convince donors to pledge, not just to secure information for follow up. You can use checkboxes or open-ended questions – which can also give you great donor testimonials!

6 Planned giving newsletters keep donors informed.

Newsletters offer helpful tips to enable donors to include your organization in their will or make other planned gifts like gifts of stock/life insurance, QCD, or DAF contributions. You can also include testimonials in the newsletter, providing social proof of peers making similar commitments.

7 Create impact brochures so donors know their gift is important.

The story of future impact is critical to securing bequests – so donors can imagine their legacy tied to yours. This type of brochure focuses on emotional motivations rather than giving vehicles, and existing donor quotes are valuable add-ins.

8 Design impactful, reader-friendly postcards to share legacy messaging.

Postcards are a great, cost-effective way to reach a large number of donors at various stages in their giving journey, and they have proven to be an asset in building a strong pipeline of legacy donors.

9 Always include a planned giving message in acknowledgments.

The best time to reinforce the message of legacy giving is immediately after a gift, while you are still top of mind with the donor. This can be done in the letter copy or with a bangtail envelope that includes more information.

10 Incorporate planned giving messages across communications.

Beyond acknowledgments, legacy messaging – as well as other planned giving messaging, like DAF giving – can be woven into regular newsletters, reply slips on mail packages, and special inserts or PS notes at various times of the year.

11 Promote planned giving across integrated channels.

This includes mail, email, social, telemarketing, texting, and more! The goal is to reach the donor where they are most comfortable, ensure they have the resources needed, and present a meaningful case to truly understand their value to your organization.

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11 Tips for Sustainer Success

4 Offer donors a sense of community – including special benefits.

Creating a standalone identity for monthly sustainers can reinforce their special role in your programs. Pair this with unique, targeted messaging and benefits that help them learn more about their impact – as well as physical or digital gifts of appreciation that allow them to showcase their belonging to your community.

Some ideas include branded decals and totes, virtual program visits and expert talks, or cell phone wallpaper and community playlists.

8 Regularly communicate to cultivate relationships.

Maintain strong connections by providing consistent updates. Regular communication ensures donors are aware of the impact of their contributions while also keeping your mission top of mind.

Utilize impact reports and stories, effectively showing the real-world results of their commitments, to keep your donors' interest and consistent support.

1 Create a dedicated strategy to promote sustainable revenue.

Monthly giving creates a reliable income stream, empowering your organization to plan effectively and allocate resources for impactful long-term projects.

Remember, that monthly donors are the backbone of your program funding, with a retention rate of 80%—nearly triple that of one-time donors at 30%.

5 Lean into long-term initiatives and messaging.

Sustaining donors tend to be loyal and stick around – and you can implicitly recognize their lasting commitment by communicating the significant, lasting community impact enabled by the support from monthly donors.

Talking about your long-term goals with donors helps make the case for their lasting investment, driving continued retention and possibly even upgrade over time.

9 Demonstrate transparency and accountability to donors.

Maintain transparency about how monthly donations are used to build trust and encourage continued investment by donors in your programs.

This is especially critical in uncertain financial times, when donors need to be reminded about the tangible returns on their support. Reinforce to them that, no matter the amount they give, their contributions make a significant impact.

2 Empower donors as changemakers.

Highlight how monthly donations allow donors to continuously contribute to change, enhancing their emotional investment in the cause.

Using “shopping lists” can help donors imagine what gifts at different levels can achieve, allowing them to understand their impact in new ways.

6 Create donor engagement outside of giving.

Inviting donors to interact with you outside of giving can lead to more layered relationships. This may include impact-driven communications like videos and testimonials, but you can also leverage quizzes, surveys, and polls as ways for donors to learn more about your mission and programs – or for you to learn more about them!

10 Enhance personalization in communications.

Customize your outreach to align with the interests and past contributions of each donor. By acknowledging their impact and preferences, donors will feel a more profound connection to the outcomes of their support.

This tailored approach enriches their experience while strengthening their commitment and feeling of partnership with your organization.

3 Prioritize accessibility and affordability.

Make giving accessible by presenting donors with smaller, manageable gift amounts on a monthly basis, attracting a diverse donor base, including younger donors. You can also increase the attractiveness of monthly giving by simplifying the donation process and supporting mobile and alternative payment options.

7 Extend monthly giving options through all campaigns!

Incorporate monthly giving options into broader campaigns like using sustainer match pushes (e.g., unlock \$200 with your first monthly gift) and postscripts in campaign communications. You can also create dedicated campaigns for monthly giving utilizing similar match tactics or unique calls to action around mission- or organization-specific moments, like awareness days or historic milestones.

11 Celebrate your donors' milestones.

Recognize key milestones in a monthly donor's journey, such as their anniversary of giving or reaching a certain giving level. Create special communications to mark these moments, reinforcing how valued and crucial their support is to your organization. This recognition shows to donors that you know them on a deeper level, and it can further serve to motivate future contributions.

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11 Tips for Mid-Level Success

1 The average mid-level donor gives at that level to six nonprofits.

Even as they spread the love, donors typically pick a preferred group that is most likely to receive their legacy gift, future major gifts, or sustained gifts through tough economic periods. A thoughtful program with insider access and recognition sets you up to stand out as their favorite.

2 Direct marketing is important – at all giving levels.

Testing shows that suppressing mid-level audiences from direct marketing decreases overall giving. Because most mid-level donors are acquired through direct marketing, they are accustomed to – and may even prefer – engaging through these channels. Therefore, it is better to create unique, specialized tracks for these donors.

3 Not all mid-level donors will become major donors.

Mid-level donors can have tremendous impact if you build strategies to upgrade donors within mid-level, rather than solely viewing the program as part of your major gift pipeline. Just imagine – if you upgrade 1,000 donors giving at \$1,000 to \$1,500 a year, that's another \$500,000 for your critical programs!

4 Should you brand your program? Absolutely YES!

Having a branded program increases awareness, engagement, and participation. These donors want to feel like they are part of a community – and a unique identity underscores that they are an active partner in your mission, together with like-minded peers.

5 Creating a personal, human touch unlocks giving.

If resources allow for dedicated donor ambassadors, spotlight it! Advertise contact details with a warm and inviting picture to underscore that donors have a friendly face they can reach with any questions. Research shows that donors who call their personal contact (not the other way around) are more likely to upgrade.

6 Premiums and giving levels work.

Levels can help upgrade donors, especially if paired with different, tangible benefits – balancing between premiums and unique opportunities for access and donor experiences. To continue driving a message of impact, align tokens of appreciation with your mission to remind donors about the community they are part of.

7 Mid-level monthly options can lift program impact.

Many donors can give more cumulatively if they split payments over the year – meaning monthly giving can increase your mid-level program size and revenue. As donors gain satisfaction from mid-level benefits, you gain peace of mind with the higher retention rates typical of monthly donors.

8 Promoting alternative ways to give creates opportunity.

Share ways to give beyond cash donations, like bequests, donor-advised fund (DAF) giving, IRA qualified charitable distributions, and beneficiary designations. Often financially savvy and secure, mid-level audiences are more likely to use these tools – and they are often the #1 source of planned gifts for nonprofits!

9 Transparency and impact reporting are critical to long-term loyalty.

Mid-level donors make an outsized investment in your work, so keeping them in the loop on progress is essential. Stewardship shows that you value them as partners in your mission, making the case for their continued commitment to your work.

10 A strategy to move donors DOWN the pipeline is valuable for re-engagement.

You should plan for absorbing donors into a strong mid-level program if they are not performing in a major gift portfolio. This offers a great opportunity to re-engage with donors who have a history indicating interest and known capacity to give.

11 It's never too early to start – even if your program is small.

Many mid-level programs have only one to two thousand donors – or less! Planting seeds early and establishing a structure of belonging can help entice donors and nurture relationships, knowing you can always add sophistication (if needed) when the program grows.