

2024 Summit – Donor Organizing: Recruiting New Donors

Facilitator: Haley Bash, Executive Director of Donor Organizing Hub

Goals

- Will Do
 - Learn frameworks and practices to recruit new donors for your group
 - Share follow-up exercises for your group to do together
- Might Do
 - Hear recruitment ideas from participants
 - Answer questions live
- Won't Do
 - Give quick fixes (if only they existed!)

Attractional vs. Relational Recruitment

Attributes	Attractional Recruitment	Relational Recruitment
Definition	Bring people outside of your network by optimizing on high-energy moments	Build using existing networks through ensuring that everyone has a list of people they're inviting
Use when	Big moments/public events where people find out what you do by seeing you in action	Prior trust is needed/preferred Outside of a "big moment"
Example	Tabling at a rally	Tasking volunteers with bringing 3 friends to a house party
Key question	How do we attract people through seeing us in action ?	Who do we want to bring in through a relationship?

- Attractional works best during activating moments – even years, big political events
- Relational is for downtime when the money isn't easily flowing in

Why Do People Donate?

- Someone **asked** them
- Reinforce their identity as a **principled** and **generous** person
 - In some cases, prestigious and important
- Be part of **community** bigger than themselves
- Feel **emotional relief** they feel guilty/anxious/angry
- **Help themselves/loved ones**: they feel directly connected to an issue

Identity and Feedback Loops

- Self-Validation Feedback Loop
 - We seek out groups of other people who share our values, ideas, interests
 - If this group is a good fit for us, these interactions reinforce our identity
 - The result is called **self-validation feedback loop**
 - This feedback loop builds trust, which makes us more likely to support the community and its goals (like donating and fundraising)

Communication Types

1. Lowest: Organization to donor (newsletter)
2. Lower: Donor to organization (reply to newsletter)
3. Better: Donor to outsider (forwards newsletter to friend)
4. Best: Donor to donor (community)

When donors know other donors:

- Their lifetime value increases as much as 4X-5X
- Their giving is resilient during economic uncertainty

Example: Flip the Vote

- Raises funds for BIPOC- and youth-led orgs through Zoom and in-person house parties
- Facilitates small group sessions for hosts to meet each other and share hopes and anxieties
- Each house party generates 2-3 more house parties

Example: Saddleback Church

- Built a church from scratch up to 20K members per week (8th largest in the U.S.)
- Focused on “bridge” events that met people where they’re at and moved them up an engagement ladder

Define Your Target

- If you're targeting everybody, you're targeting nobody
- Geographically, Demographically, Culturally, Level of commitments to the issue
- Learn about your target donor through 1:1s and surveys
- See the donor as a whole human

Before People Commit

- Are they actually needed?
- What is the benefit in donating for them?
- What is expected or required of them if they donate?
- Will they make friends?

Growing Your Donor List

- Create an atmosphere of acceptance
- Monitor effectiveness on a regular basis by asking first-time donors to give their frank, honest first impressions
- Offer something they can't get anywhere else

Take-Home Resources

- Reflection prompts
- Empathy Map Exercise
- Recruitment Exercise

Empathy Map

- Tool for teams to develop shared understanding/empathy for target group
- Focus on one target person's "Before" and "After" contact with your group
- Enable stronger decision making in donor recruitment process

Recruitment Exercise

- Problem: Recruiting and retaining donors is challenging for grassroots organizations.
- Barriers: People don't have enough time to research/resources to donate. Donors don't feel like they're making a difference. People forget they committed to donate. People don't think they're "ideal" donors (stereotypes of white, wealthy, "well-connected")

1. Brainstorm
2. Design Telephone

3. Share Out
4. Data Collection

Debrief and Closing

- hailey@donororganizerhub.org
- What do we do with the whiners?
 - They may not be your target; or, try a new tactic
- Is there an easier way to highlight first-timers in ActBlue data?
 - It's hard, but worth it! Find a data person who can do it for you
 - Susan can explore in Periscope dashboards
- Is there a way to encourage more of that higher-level interaction (numbers 3 & 4) with our readers?
- In approaching a wealthy friend, how do you know how much to ask?
 - Trying to move them from an impulse gift to a regular gift
 - Ask for 10X their past donation amount
- SD Sacramento is having a lot of first time volunteers coming to our kickoff. What's the most important thing to do to start engaging them?
 - Little bit of action, whole lot of community building
- Other Qs
 - Does a donation motivate or suppress likelihood of volunteer action
 - We are an LLC, we want to do a PAC. Advice?

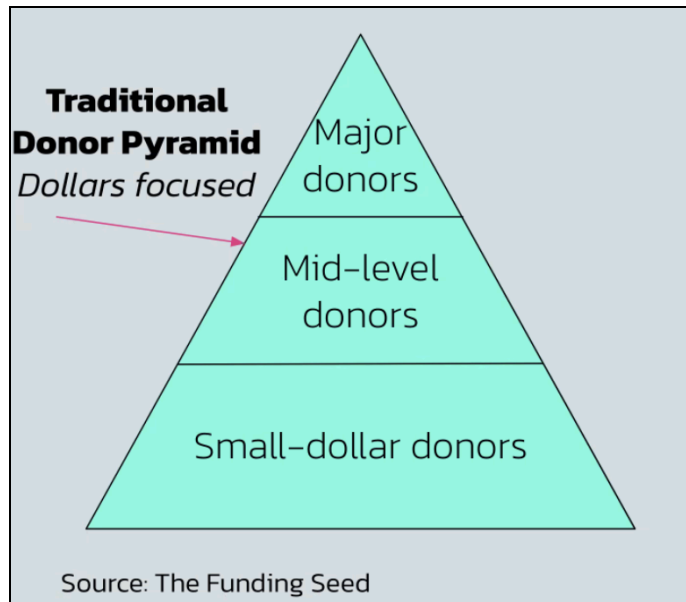
2024 Summit – Donor Engagement Ladder

Facilitator: Haley Bash, Executive Director of Donor Organizing Hub

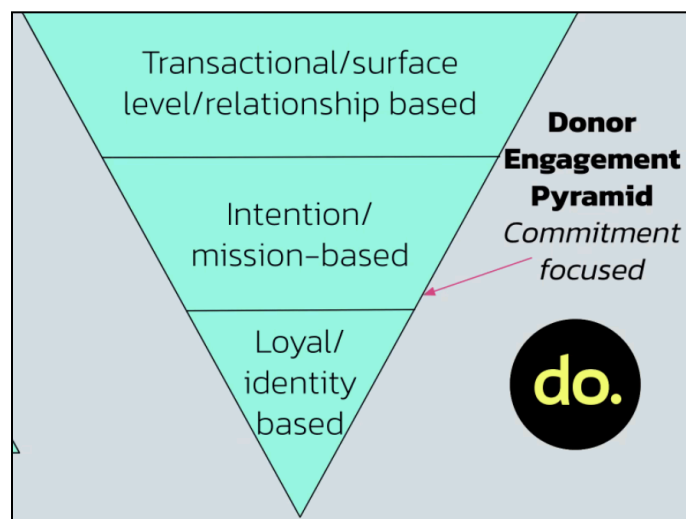
Goals

- Will do
 - Learn the whats and whys of donor engagement ladders
 - Overview activities, tracking/goal setting, and potential roles for developing a donor engagement ladder
- Might do
 - Answer questions live
- Won't do
 - Give quick fixes (if only they existed)
 - Dive deeply into any one donor engagement step

Donor retention and upgrading



- How a “major donor” is defined varies by group. Ask yourself who you would give extra attention to in order to get them to contribute more.



- Instead of using a dollars-focused donor pyramid, use an engagement-focused pyramid. Create donors whose identity is connected to Sister District.

Donor engagement

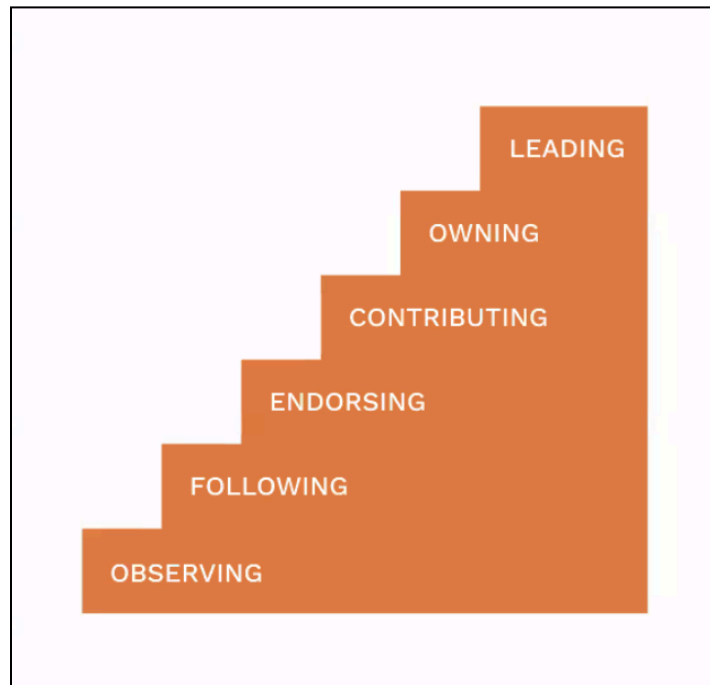
- How attentive and involved are your donors with your organization?

Engagement mindset

- We rarely know what a dollar means to a donor.
- Donors who give “small” donations often have unseen financial capacity.
- Transactional fundraising does not build movements or create meaningful change.

Engagement ladder

- It moves people from observation to an action-oriented relationship.



- Observing - first introduction to organization (e.g., website, event, tabling)
- Following - keeping tabs on organization (e.g., newsletter, social media, webinar)
- Endorsing - mentioning organization to contacts (e.g., forwards, shares)
- Contributing - making donations to organization
- Owning - volunteers, bring friends or ideas
- Leading - takes leadership role in organization

Where is your group getting stuck in the engagement ladder?

Three psychological needs for well-being

- Autonomy: to perceive that we have choices
- Relatedness: to give and receive care from others
- Competence: to feel effective meeting challenges

I'm Too Busy

- People don't always say "yes" to our asks right away.
- "I'm too busy" or "I don't know" can be transformed into a "yes" if we know what someone is hesitant about.
- Example:
 - Statement: "I've never fundraised before."
 - Response: "That's not a problem. We expect this will be the first time for most people. We'll train you and answer any questions you have. Is there a specific thing you're concerned about?"

Base-building activities

- 1) Strengthen group relationships
- 2) Build new donors into your group
- 3) Strengthen existing donor identity into your group

Examples: cultural events, political education events, listening sessions/focus groups, lunch and learns, happy hours, trainings, half action party/half social time

1 Scale of 1-5: **5**

● ————— ●

My group has tried My group has tried
NONE of these **ALL** of these

What would you rate your group's experience with base building activities? Share in the chat!

Example: Force Multiplier

- Hosts points of entry without fundraising
- Makes three asks of attendees
 - Host a point of entry
 - Become a multiplier
 - Join email list for invitations to Zoom fundraisers with candidate and organizations

- **Tracking and goal-setting**

- What do/will you do to track donor progress? Start small and improve over time.
- What are the three most important metrics? Review progress on them each week.
- Where are people getting stuck?

- **Potential roles**

- Recruitment lead
- Welcomer
- Data lead
- Fundraising coach

- **Take home Efficacy primer**

- Efficacy: an individual's belief in their ability to reach specific goals
 - Self-efficacy: They are capable of helping.
 - Responsive efficacy: Their voice will be heard.
 - Collective efficacy: Acting together is more effective than acting alone.
 - Collective response efficacy: The solutions we're pushing for will solve this problem.

- **Take home: Journey map**

- Tools for teams to represent a supporter's experience and emotion within the organization
- Initial awareness ---> taking on a leading role
- Includes touchpoints with the organization, pain points, and emotions
- Helps understand a supporter's perspective and identify areas of improvement