

# Recruit New Donors

SISTER DISTRICT SUMMIT



# About Me

👋 Haley Bash (they/she)



💛 Founder/Executive Director, Donor Organizer Hub

🔧 Began as volunteer fundraiser



# 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!)



# Recruitment Types

Attributes	Attractional Recruitment	Relational Recruitment
Definition	Bring people <b>outside of your network</b> by optimizing on high-energy moments	Build using <b>existing networks</b> 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 <b>seeing us in action</b> ?	Who do we want to <b>bring in</b> through relationship?



Think of a cause you've made a donation to for the first time recently.

What's 1 reason you donated?

*Share in the chat!*

do.

# Reasons People Donate

- Someone **asked** them
- Reinforce their identity as a **principled** and **generous**
  - In some cases, prestigious/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



# Self-Validation Feedback Loop

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



# Communication Types

*In order of impact on identity (lowest to highest):*

1. Organization to donor (newsletter)
2. Donor to organization (reply to newsletter)
3. Donor to outsider (forwards newsletter to friend)
4. Donor to donor (community)

**When you focus on #4, you're going to raise more money and bring in more people.**





# 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



# Case Study: 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 Donor

Become an expert on your target donor!

- Geographically
- Demographically
- Culturally
- Level of commitment to the issue

Learn through 1:1s and surveys



# Before People Donate

They want to know:

- 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



# Reflection Prompts

- Who is your target donor - geographically, demographically, culturally?
- What is their level of commitment to the issue you are raising for?
  - Directly impacted and/or knows a lot
  - Knows a little but not a lot
  - Does not know about issue at all
  - Knows about issue but does not care





# 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



# Empathy Map Canvas

Designed for:

Designed by:

Date:

Version:

The diagram is a large rectangle divided into seven numbered sections around a central face. The face is a circle with a large 'C' for an ear on the left, a solid black oval for an eye on the right, and a jagged line for a mouth at the bottom right. The sections are as follows:

- 1 WHO are we empathizing with?**  
Who is the person we want to understand?  
What is the situation they are in?  
What is their role in the situation?
- 2 What do they need to DO?**  
What do they need to do differently?  
What job(s) do they want or need to get done?  
What decision(s) do they need to make?  
How will we know they were successful?
- 3 What do they SEE?**  
What do they see in the marketplace?  
What do they see in their immediate environment?  
What do they see others saying and doing?  
What are they watching and reading?
- 4 What do they SAY?**  
What have we heard them say?  
What can we imagine them saying?
- 5 What do they DO?**  
What do they do today?  
What behavior have we observed?  
What can we imagine them doing?
- 6 What do they HEAR?**  
What are they hearing others say?  
What are they hearing from friends?  
What are they hearing from colleagues?  
What are they hearing second-hand?
- 7 What do they THINK and FEEL?**  
**PAINS**  
What are their fears, frustrations, and anxieties?  
**GAINS**  
What are their wants, needs, hopes and dreams?  
What other thoughts and feelings might motivate their behavior?

# 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 they're making a difference.

People don't think they're "ideal" donors (stereotypes of white, wealthy, "well-connected").

People forget they committed to donate.

# Recruitment Exercise

1. Brainstorm
2. Design Telephone
3. Share Out
4. Data Collection

*Minimum needed: 3 people, 15 minutes*



# Thank you!

Got questions? Contact: [haley@donororganizerhub.org](mailto:haley@donororganizerhub.org)



# Donor Engagement Ladder

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# Goals

## Will Do

Learn 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 ladder step

A black circle containing the word "do." in a bright yellow, lowercase, sans-serif font.



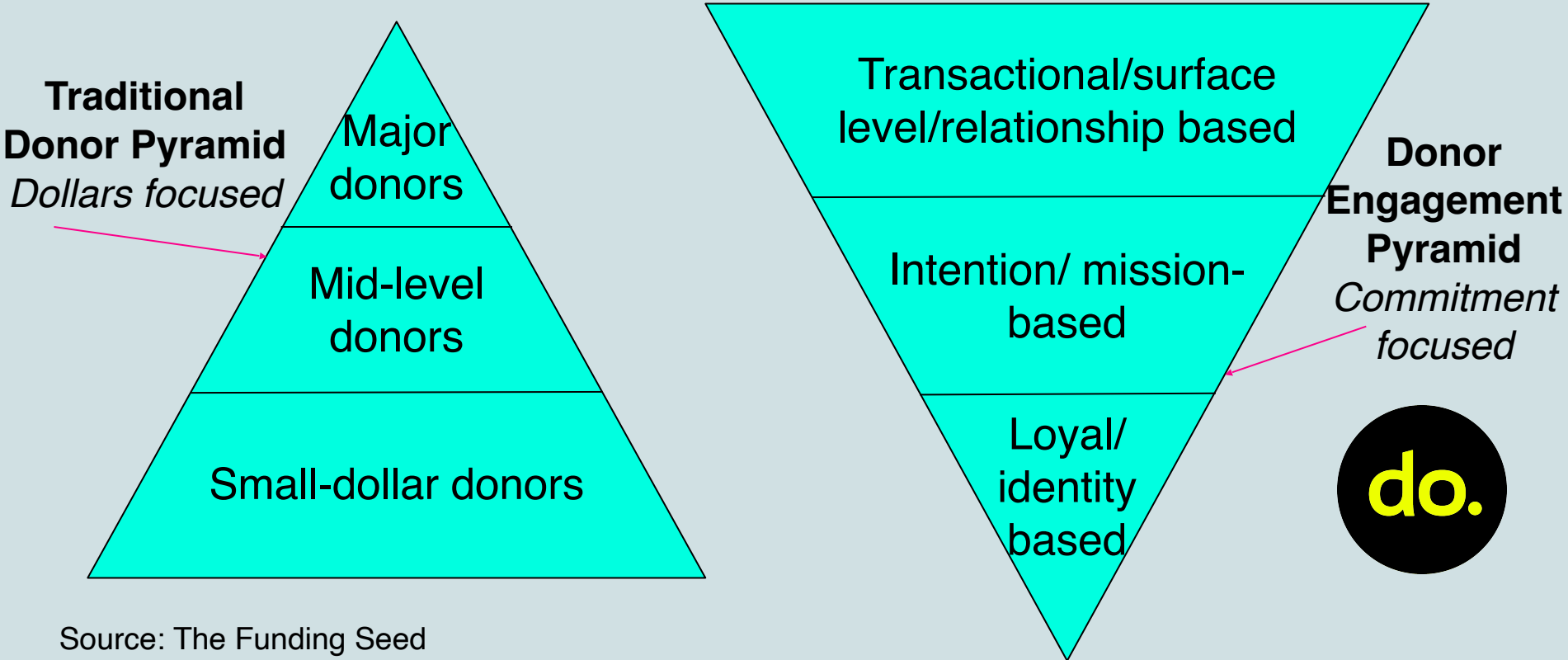
In 1-2 sentences:

How did you become a leader/  
member for your group?

*Share in the chat!*

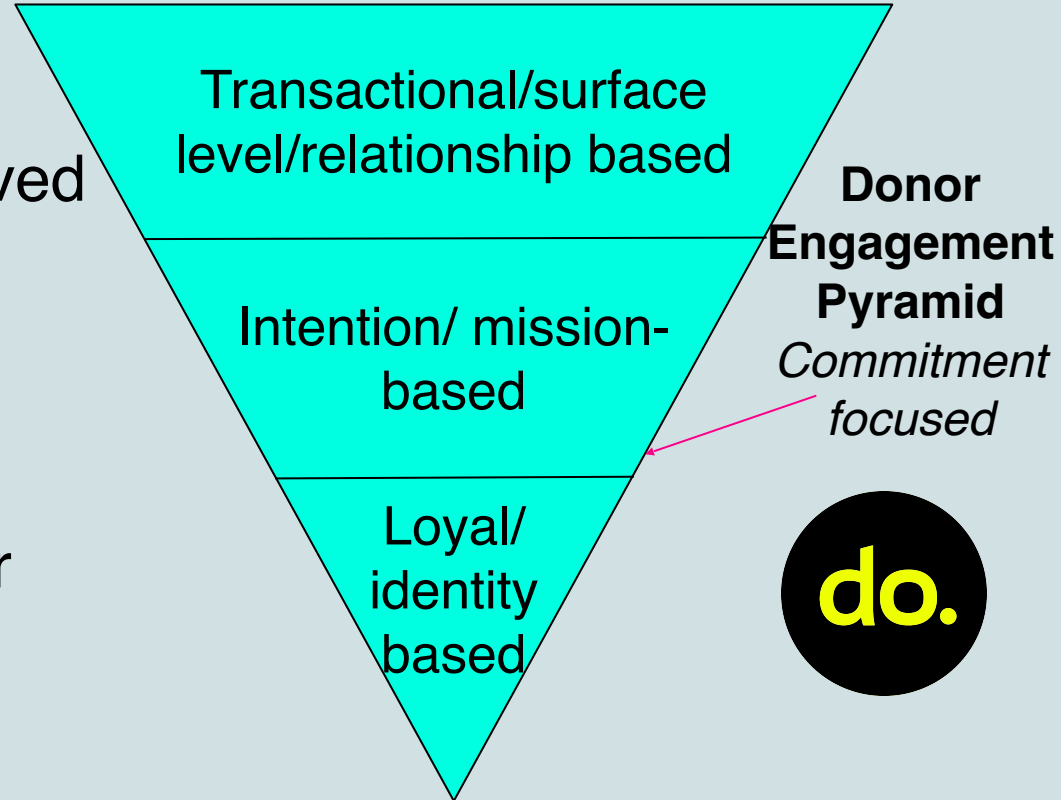


# Donor Retention/Upgrading



# Donor Engagement

- How attentive and involved donors are with your organization
- Key to donor retention/ upgrading and volunteer leadership



# Engagement Mindset

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



# Engagement Ladder



# Journal: Which step(s) are people getting stuck in your group?



# 3 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”/“I don’t know” can transform into yes if we understand why someone is hesitant
- **Example:** “I’ve never fundraised before.” -> “That’s not a problem! We expect that this will be most people’s first time. We’ll train you and answer any questions you have. Do you have a specific thing you’re concerned about?”



do.



# Base Building Activities

1. Strengthen group relationships
2. Bring new donors into your group
3. Strengthen existing donors' identity with your group



# Base Building Activities

- Cultural events
- Political education events
- Listening sessions/focus groups
- Lunch and learns
- Happy hours
- Trainings
- Half “action parties,” half social time
  - Friend bank, phone bank, letter writing

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 point of entry events without fundraising
- Makes 3 asks of attendees:
  - Host a point of entry event
  - Become a Multiplier
  - Join email list for invitations to Zoom fundraisers with candidates and orgs



# Tracking & Goal Setting

- What do/will you use to track donors' progress?
  - Start small and improve over time
- What are 3 most important metrics? (Review progress on them weekly together!)
- 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 capacity to reach specific goals
  - **Self-efficacy:** They are capable of helping.
  - **Response 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 the problem.
- Prompts that support building donors' sense of efficacy



# Take-Home: Journey Map

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

**Journey from viewing content on social media to role on a team**

Stage	Sees live stream of hunger strike action	Joins Whatsapp chat	Gets 1-1 text & call from volunteer inviting them to a meeting	Joins welcome event for new members led by local circle coordinator	Joins outreach team: takes the role as outreach captain for local march
Doing	At work & sees action live stream, looks for information for how to join, clicks on the link.	Sees a lot of messages, scrolls through to look for trustworthy information, sees an invitation to call their legislator.	Gets a message from a volunteer. Asks for info about licenses. Gets invited to a local event.	Recognizes the address, sees a neighbor there too, listens & doesn't talk much.	Signs up to do recruitment for the march. Gets connected to a coach. Gets invited to follow-up meeting.
Thinking	"Are these people too extreme?" "I could never do that! God bless them for being brave & fighting for us!"	I don't know who is in charge. I'm confused about what I can do to help. I'd like to support the people risking their health for me.	Who is this person? How did they get my number? Finally, I can ask the questions I have. Maybe I can help.	Will this be different from other promises politicians make? I've never talked about some of these things before, even with close friends.	Can I do that? I've never done this before, & they have so much experience. I wonder what my family will say.
Feeling	Hopeful, scared, suspicious	Confused, guilty for not doing more, grateful	I matter, relieved, & less alone. A little suspicious	Shy, relieved to see friend, hopeful, I'm not alone, some doubt	They believe in me. Supported. Nervous about talking to people & family.
Ideas: What can you do to increase people's experience of autonomy, competence & relatedness?	Make sure people taking action look relatable. Mothers & fathers, not just young people or people rated in the US	Welcome message in WhatsApp chat. Someone is responsible for monitoring the chat & making sure new people feel welcome.	Person texting must feel relatable. Should be local & from the same community as the new person.	Create a sense of efficacy—why is this campaign different? We should explicitly say we can't rely on politicians & their lies, but that this campaign will be different because we are relying on popular power.	There should be a coach to help people have conversations with family. Small support group meetings during the training about how to talk with your family & ask for their support.



# Journey from viewing newsletter to becoming relational fundraiser

<b>Stage</b>	Gets forwarded email from a friend	Attends group virtual intro session	Donates	Gets follow-up from volunteer to set up 1:1 for answering questions and sharing volunteer opportunities	Joins fundraising team: takes role as relational fundraiser
<b>Doing</b>	Takes a break from making dinner to check email, sees it's forwarded from friend and clicks link	Sees a group of volunteer leaders confident in sharing their story and group. Listens with shyness	Clicks on donation link in follow-up email from event and gives \$25	Gets an email from a volunteer. Asks how they decide which candidates to support. Learns about different teams in the group	Commits to raising \$1,000. Gets connected to a buddy. Gets invited to a follow-up meeting
<b>Thinking</b>	"I've never really seen myself as an activist. Thank God they're doing all this work!"	"I don't know who is in charge. I'm confused about what I can do to help. I'd like to support in ways I can."	"I'd like to support what these committed people are doing, but I don't have the experience or time to help."	"Who is this person? Finally, I can ask the questions I have. Maybe I can help."	Can I do this? I've never done this before and they have so much experience. I wonder what my friends will say.
<b>Feeling</b>	Anxious, overwhelmed	Guilty for not doing more, grateful	A little relieved, a little less alone, but still unclear if making a difference	Shy, relieved, I matter, some nervousness	They believe in me. Supported. Nervous about talking to friends and family
<b>Ideas:</b> What can you do to increase people's experience of autonomy, competence & relatedness?	Include testimonials of current donors/ volunteers so people look relatable to them	Allow people to share intros in the chat and share why they joined in breakouts. Create a sense of why-why is this group different?	Follow-up email that shares ways to plug in/stay updated. Thank you call from volunteer.	Person conducting 1:1 must feel relatable - concerned community member like them.	Buddy system to help people prep for fundraising asks to friends and family. Small group support meetings about how to make fundraising asks and get support.



# Share in the Chat

What's one thing you're taking away from today?



# Peer Coaching for Volunteer Fundraisers

- 3-month cohort (Apr-Jun)
- Application open through Monday, March 11



**[donororganizerhub.org/peer-coaching](https://donororganizerhub.org/peer-coaching)**

Questions? Contact: [haley@donororganizerhub.org](mailto:haley@donororganizerhub.org)

