



# *The* **NONPROFIT RECURRING GIVING BENCHMARK STUDY**

*Produced by NextAfter  
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# **NIO SUMMIT**

SEPT. 27-28, 2018  
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**AMY ZHANG**  
Senior  
Manager of  
Demand  
Generation at  
charity:water



**DAVID JP  
PHILLIPS**  
The Magical  
Science of  
Story Telling



**AMY  
HARRISON**  
How to Write  
Copy that  
Crushes  
Objections and  
Gets Donations



**ANDY  
CRESTODINA**  
Next Level  
Optimization –  
Search,  
Conversion,  
and Content



**MICHELLE  
HURTADO**  
Head of Ad  
Grants at  
Google



**KARL GILIS**  
Why You Fail at  
Digital  
Marketing, and  
What to Do  
About It





# 2 FOR 1 TICKETS

THROUGH JULY 31<sup>ST</sup>

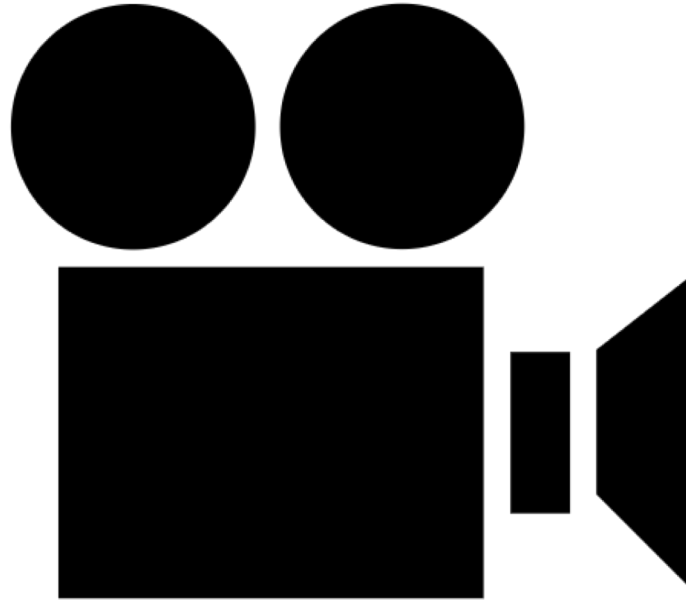






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# A Few Quick things...



A video recording of this broadcast will be sent to you afterwards.



# A Few Quick things...



Links to featured resources and experiments will be sent out with the recording.

# A Few Quick things...

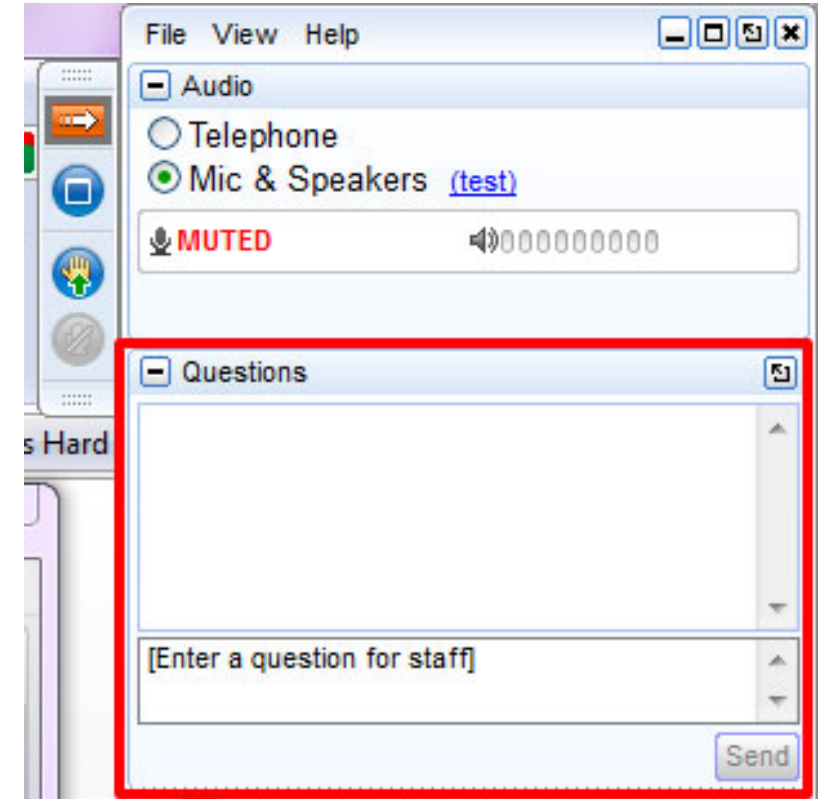


We want your questions!



# A Few Quick things...

Use the “Questions” tab in GoToWebinar to ask a question.



# Today's Speakers



**Brady Josephson**

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Innovation & Optimization

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@bradyjosephson



**Tim Kachuriak**

Chief Innovation &  
Optimization Officer

[tim@nextafter.com](mailto:tim@nextafter.com)

@DigitalDonor



**Kate Mirkin**

Director of Nonprofit  
Product Marketing

[kmirkin@salesforce.com](mailto:kmirkin@salesforce.com)



# Forward-Looking Statements

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# Our Path to Impact

Improving the State of the World



Delivering technology to nonprofit,  
educational and philanthropic  
organizations

89%

REPORT SALESFORCE  
HELPS THEM BETTER  
ACHIEVE THEIR MISSION



Building a future-ready, diverse,  
talented and skilled workforce  
through technology & financial  
grants

+2,000%

GIRLS' ENROLLMENT  
IN COMPUTER  
SCIENCE IN SFUSD



Empowering an army of citizen  
philanthropists and driving  
community innovation

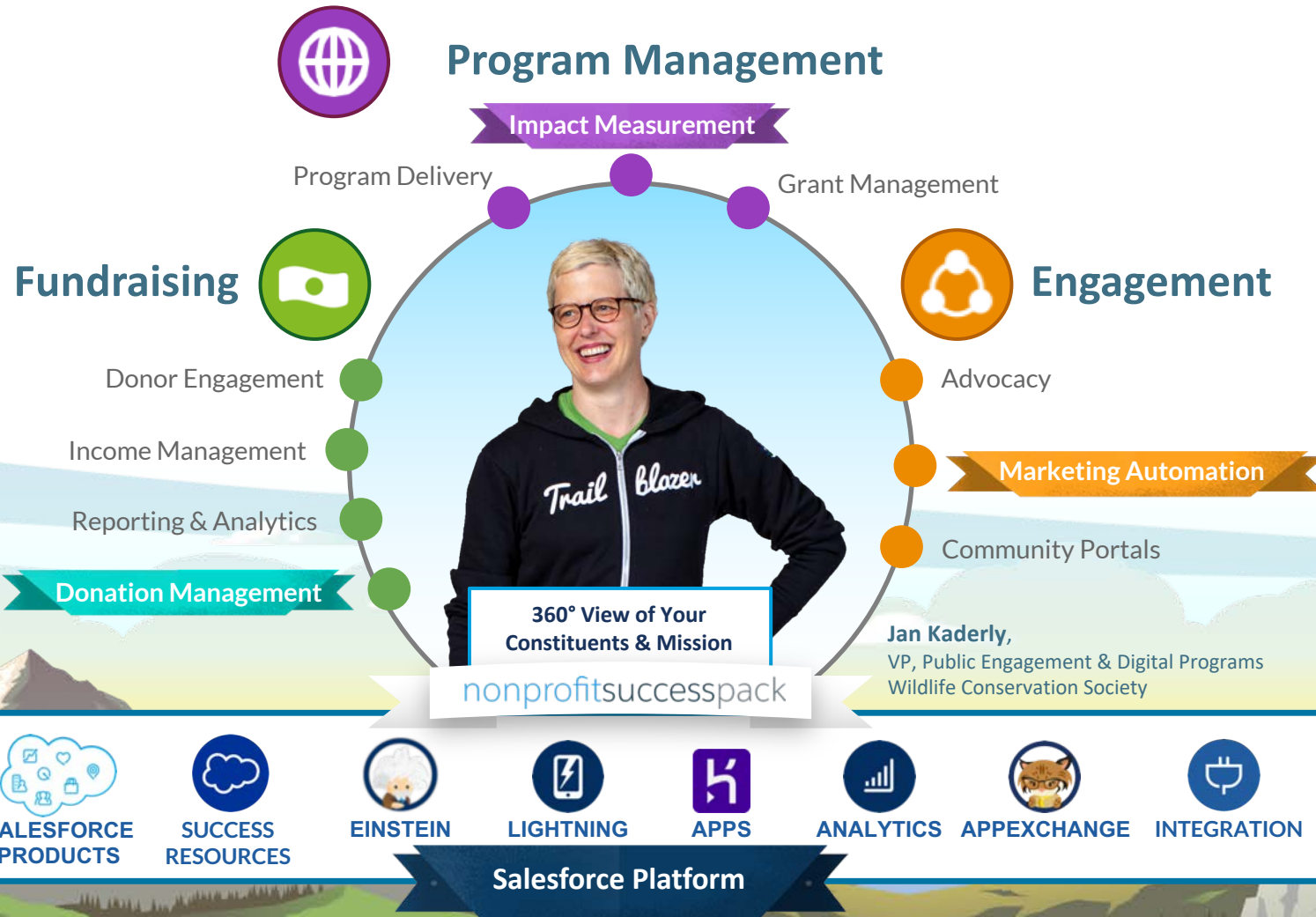
40,000+

MEMBERS  
OF ONLINE  
COMMUNITY



# Salesforce.org Nonprofit Cloud

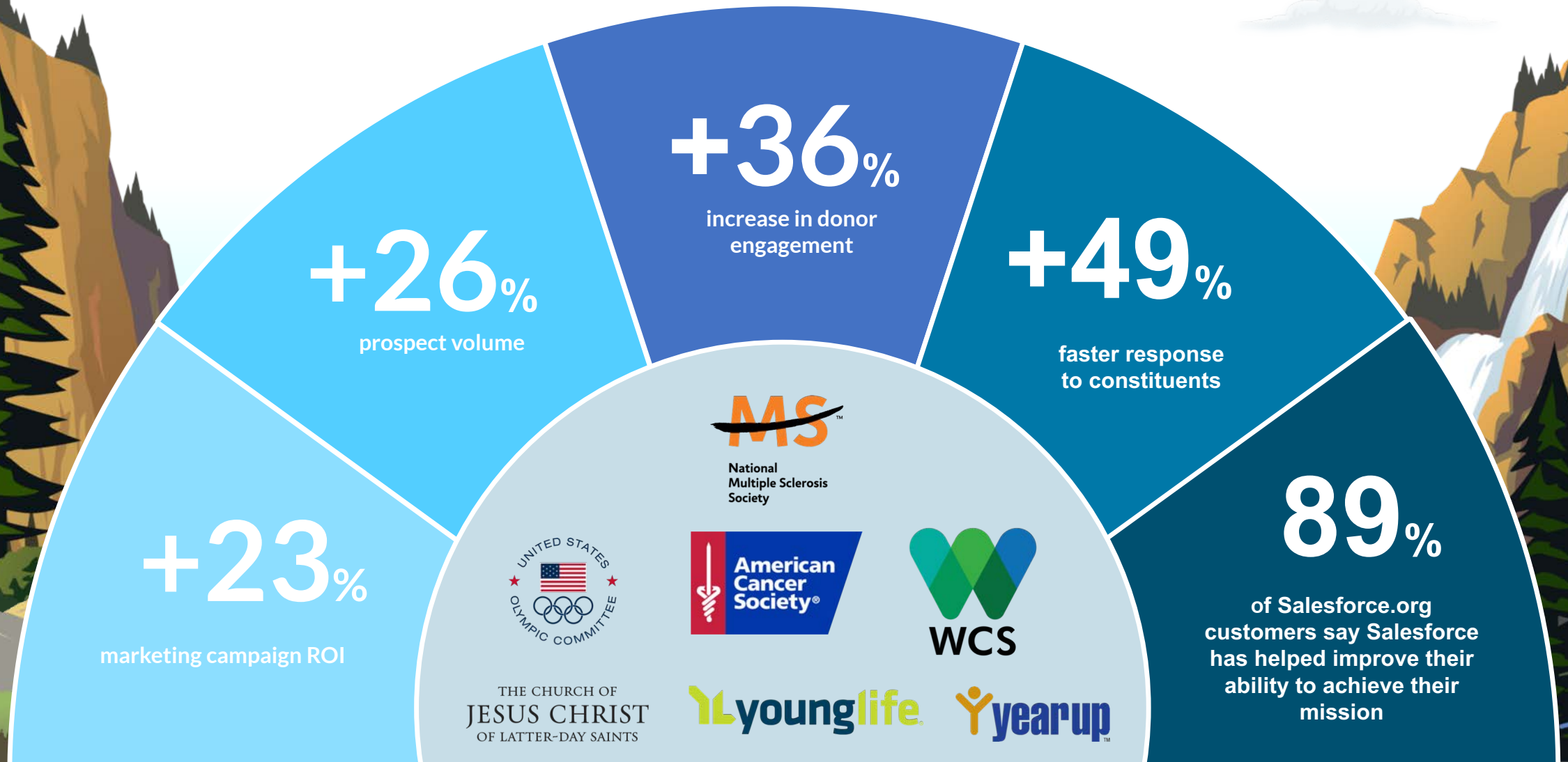
Become a Connected Nonprofit





# Customer Success

salesforce.org

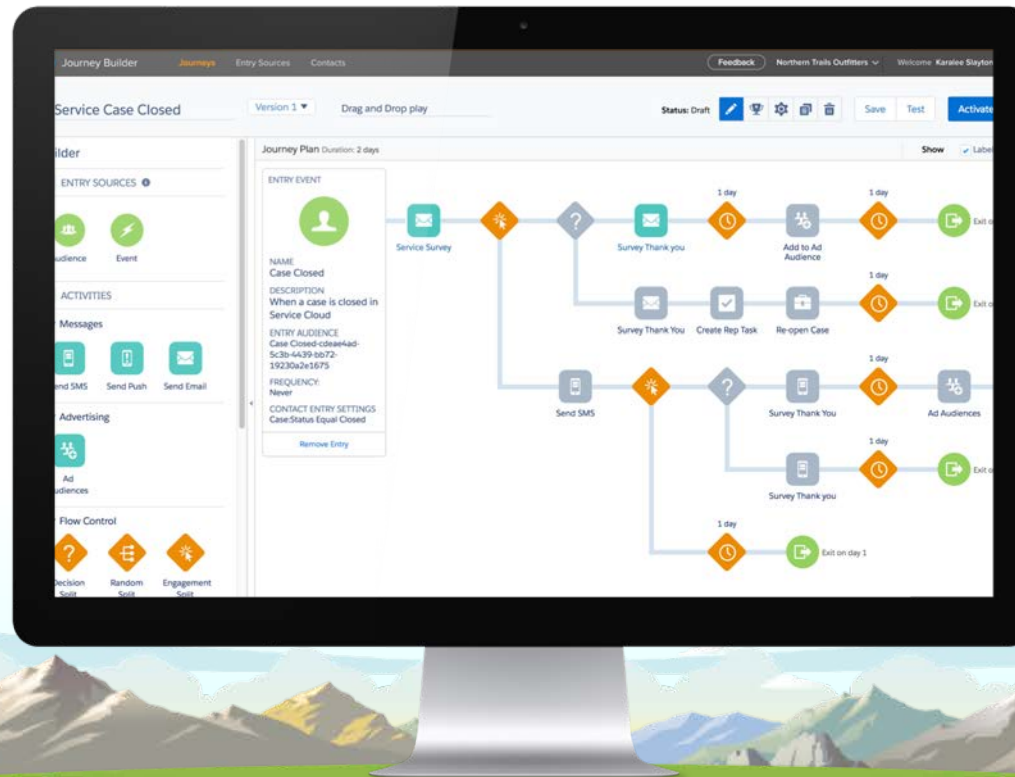


# Marketing Engagement: Connect with your Constituents

Send the right message to the right person at the right time



Manage communications across every channel: email, mobile, web, ads & more



Design & automate 1:1 constituent journeys



Identify & engage in conversations about your organization & cause

# Fundraising: Raise More Resources

Acquire, grow and retain your donor base

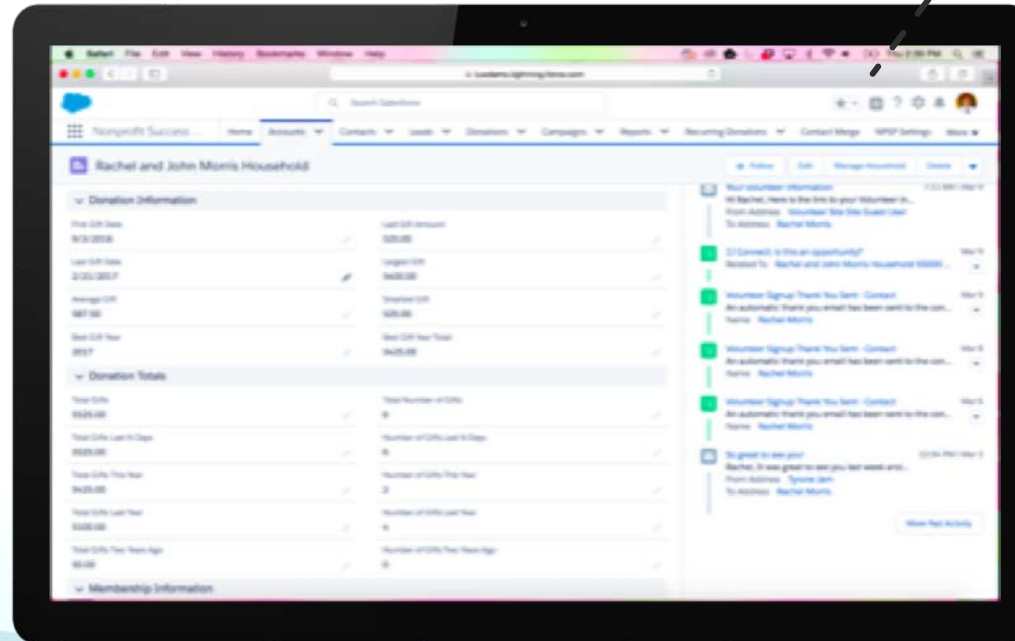


Connect to an ecosystem of apps for online fundraising, wealth data and more

Access a complete view of your donors, prospects and households in one place, from anywhere



Track and manage the donation cycle from pledge to payment



Engage donors with the right message at the right time

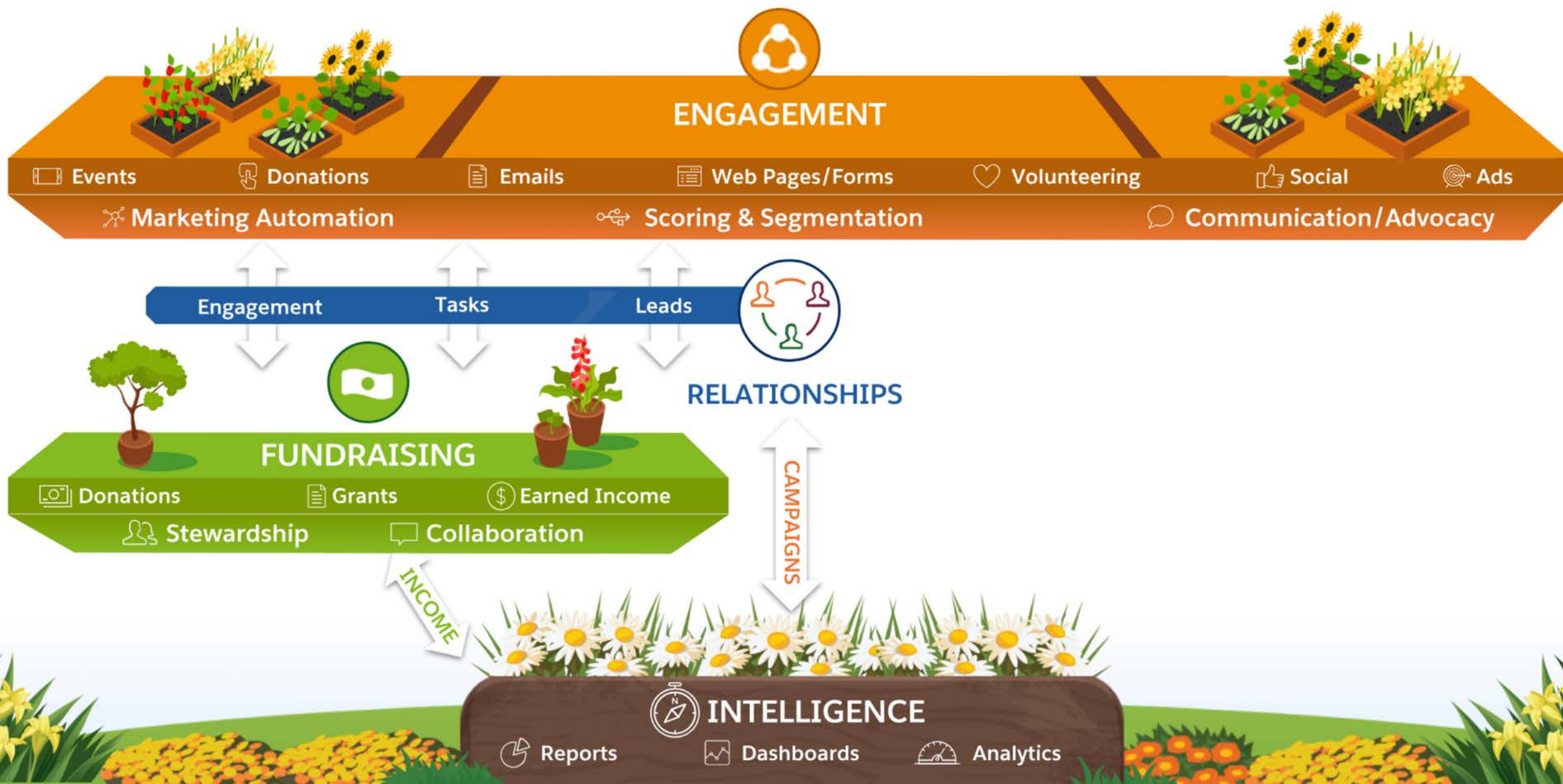


Measure and report on fundraising success with out-of-the-box reports and dashboards





# Engagement & Fundraising Work Better Together



# THANK YOU







# *The* **NONPROFIT RECURRING GIVING BENCHMARK STUDY**

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# WHY DO THIS STUDY?



# About NextAfter

Combines the perpetual learning of a marketing and fundraising **Research Lab** with the practical application of a **Consultancy**:

- 1100+ unique experiments spanning a combined sample of more than 204,270,874 donor interactions.
- Research with 310+ not-for-profit organizations to-date
- 6 Major studies, 6 Whitepapers, 19+ Instructional videos, 3 Courses, and Database of over 54,462 messages



## NextAfter





Combines the perpetual learning of a marketing and fundraising **Research Lab** with the practical application of a **Consultancy**.

To help nonprofits *reach more people, acquire more donors, and generate more dollars to fund their world-changing work.*

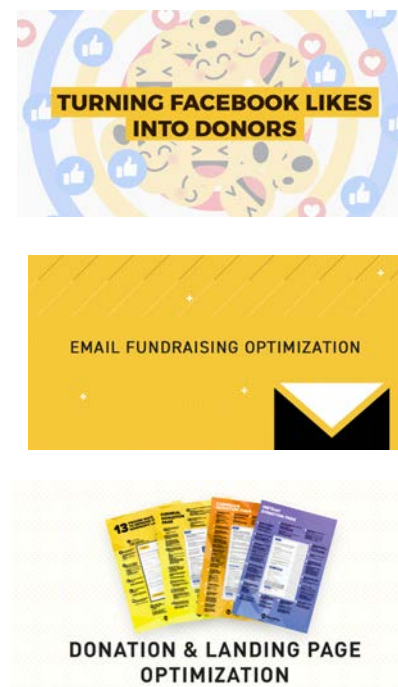
## RESEARCH



## RESOURCES



## COURSES



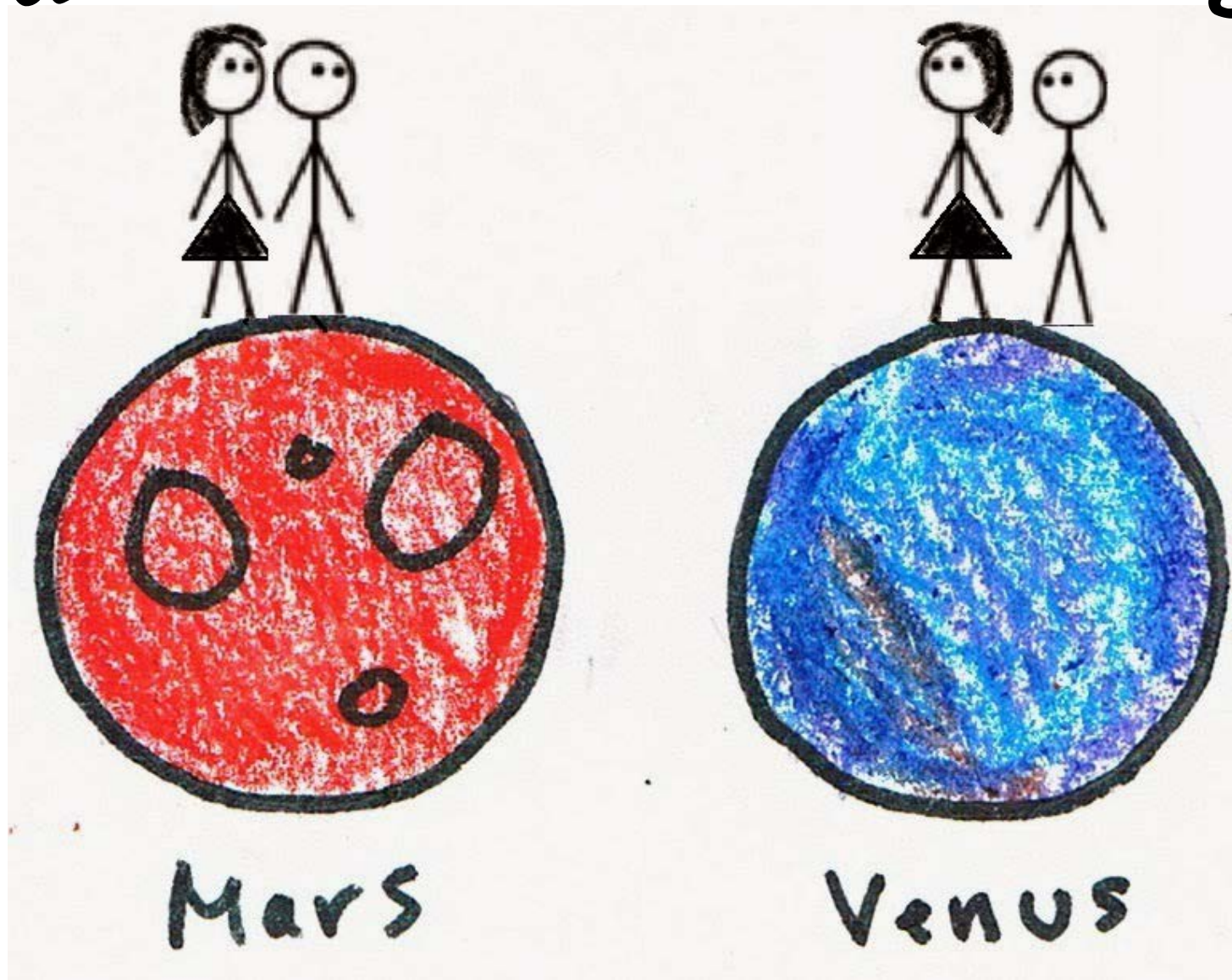
## TOOLS



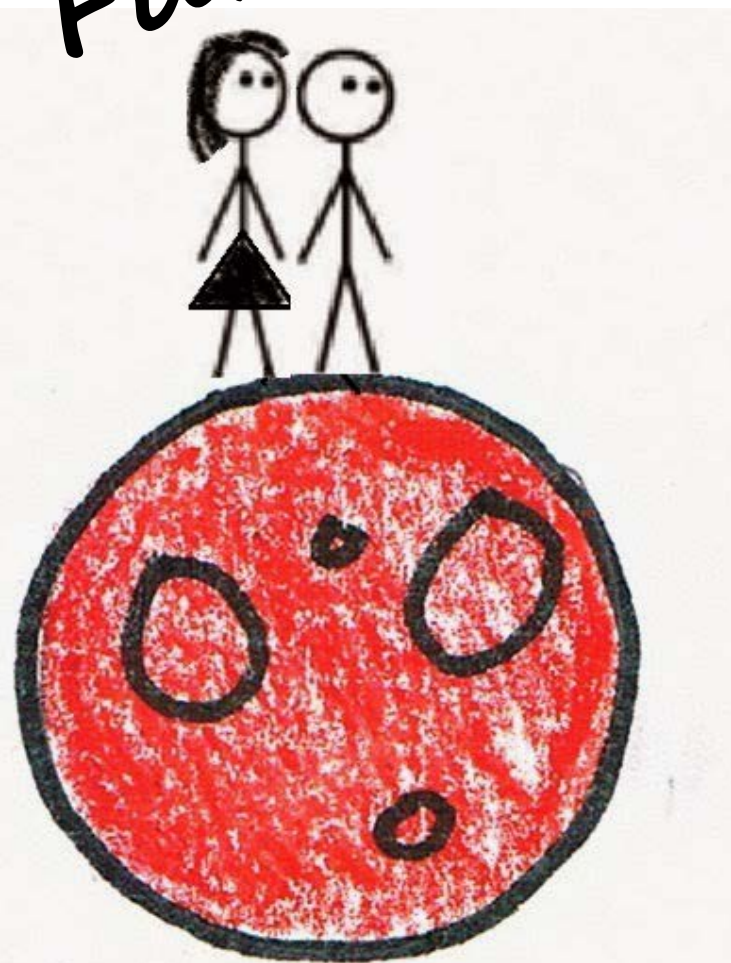


Fundraisers

Donors

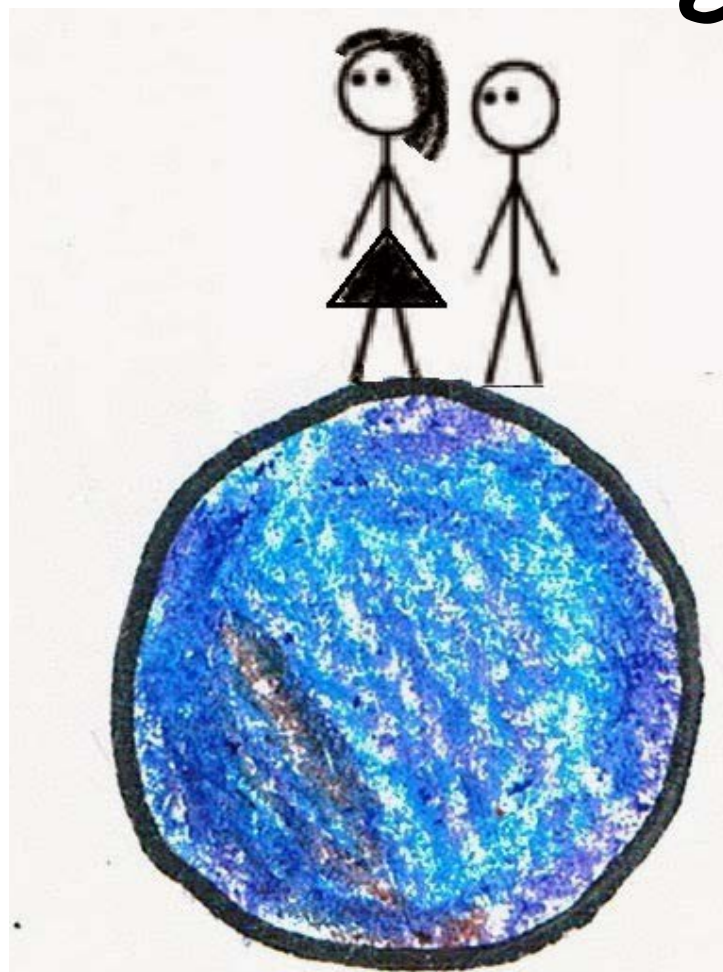


Fundraisers



Mars

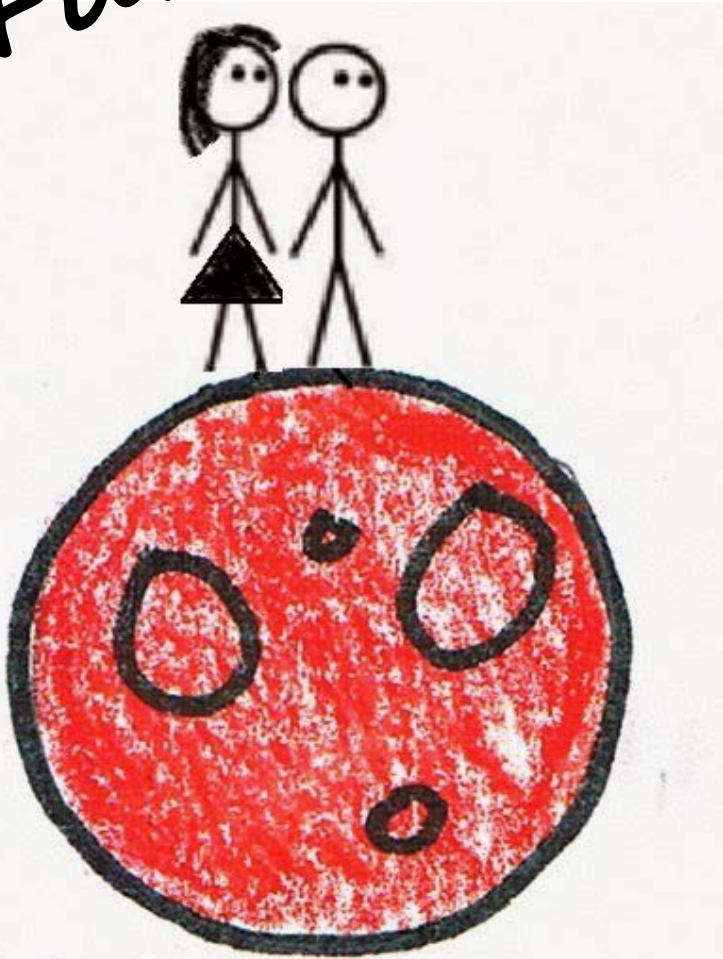
Donors



Venus



Fundraisers



Mars

Donors



Venus



# Fundraisers



Mars



# Donors



Venus

# Fundraisers



Mars



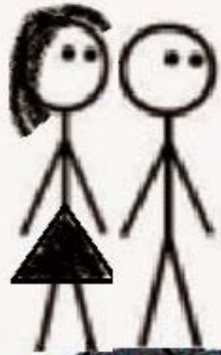
# Donors



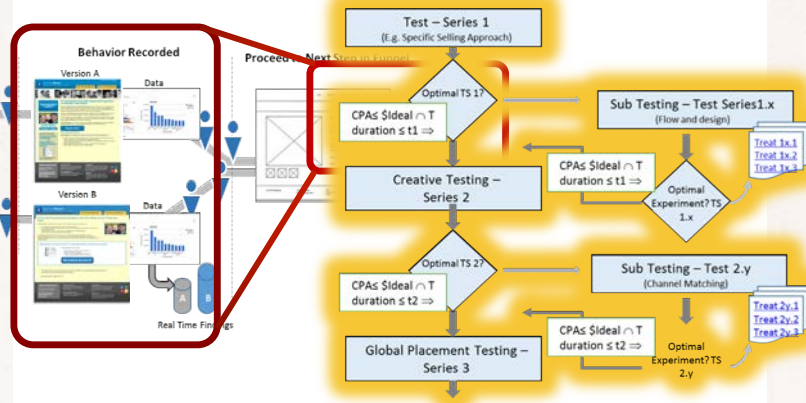
Venus



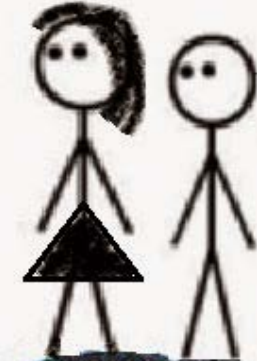
# Fundraisers



## Mars



# Donors



## Venus



# Fundraisers Donors



Mars



Venus



DATA



TESTING



INSIGHTS

**WE SEEK INSIGHTS THAT WE CAN TEST.**

# WHY RECURRING GIVING?





RECURRING DONORS ARE  
WORTH **5.4X** MORE THAN  
ONE-TIME DONORS OVER  
THEIR LIFETIME.

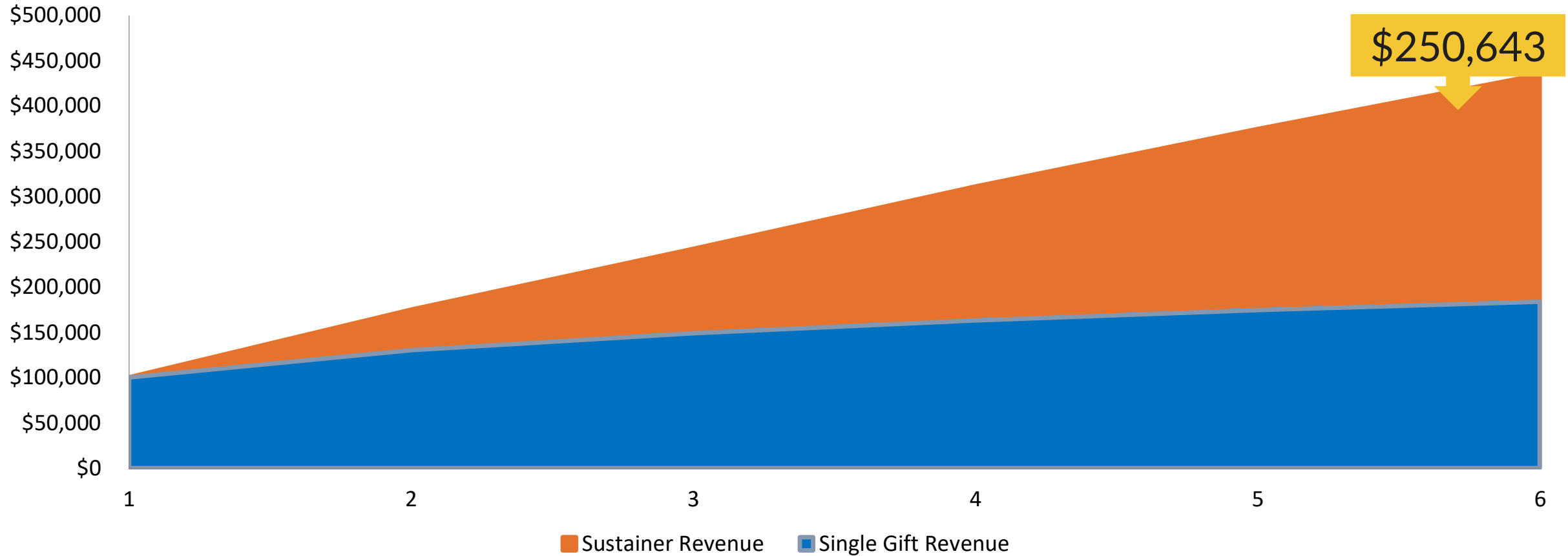
**“THE SINGLE LARGEST OBSTACLE  
TO A SUCCESSFUL MONTHLY  
GIVING PROGRAM IS **BUY-IN.**”**

- Harvey McKinnon, Author of Hidden Gold

RECURRING DONORS  
ARE GOOD FOR YOU.



# 6 Year Value of 1,000 Donors



# LIFETIME VALUE

**LIFETIME VALUE**

**=**

**AMOUNT GIVEN**

**X**

**TIME GIVING**



LIFETIME VALUE

=

AMOUNT GIVEN

X

TIME GIVING

THE AVERAGE RECURRING  
DONOR WILL GIVE 42% MORE IN  
ONE YEAR THAN THOSE WHO  
GIVE ONE-TIME GIFTS.

LIFETIME VALUE

=

AMOUNT GIVEN

X

TIME GIVING



RECURRING DONORS ARE MORE  
THAN **2X** MORE LIKELY TO GIVE  
BEYOND 1 YEAR.

LIFETIME VALUE

=

AMOUNT GIVEN

X

TIME GIVING

**LIFETIME VALUE**

**=**

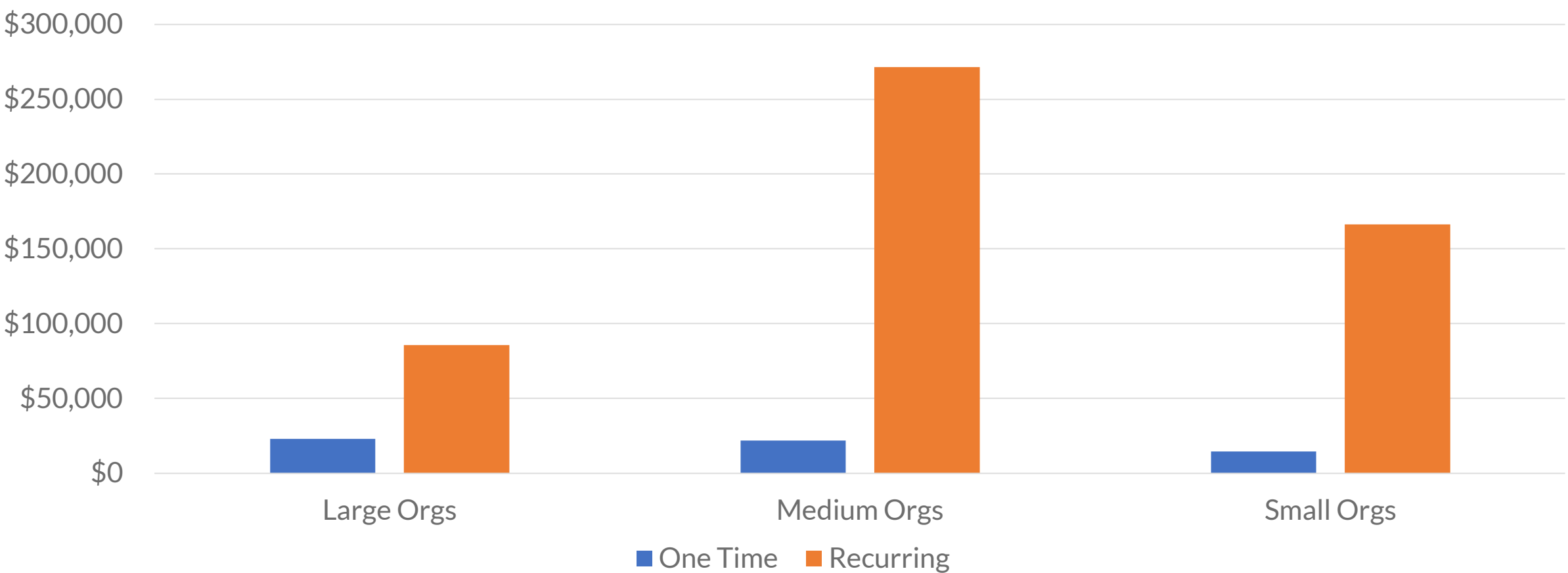
**AMOUNT GIVEN**

**X**

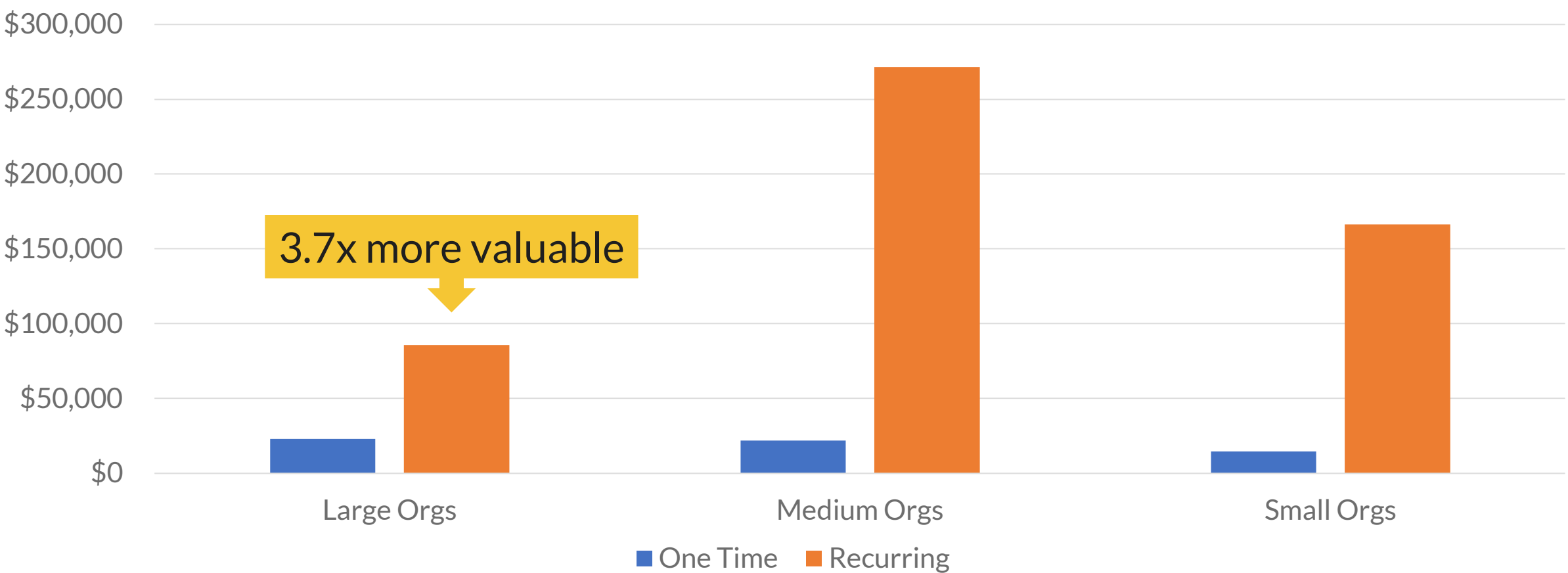
**TIME GIVING**



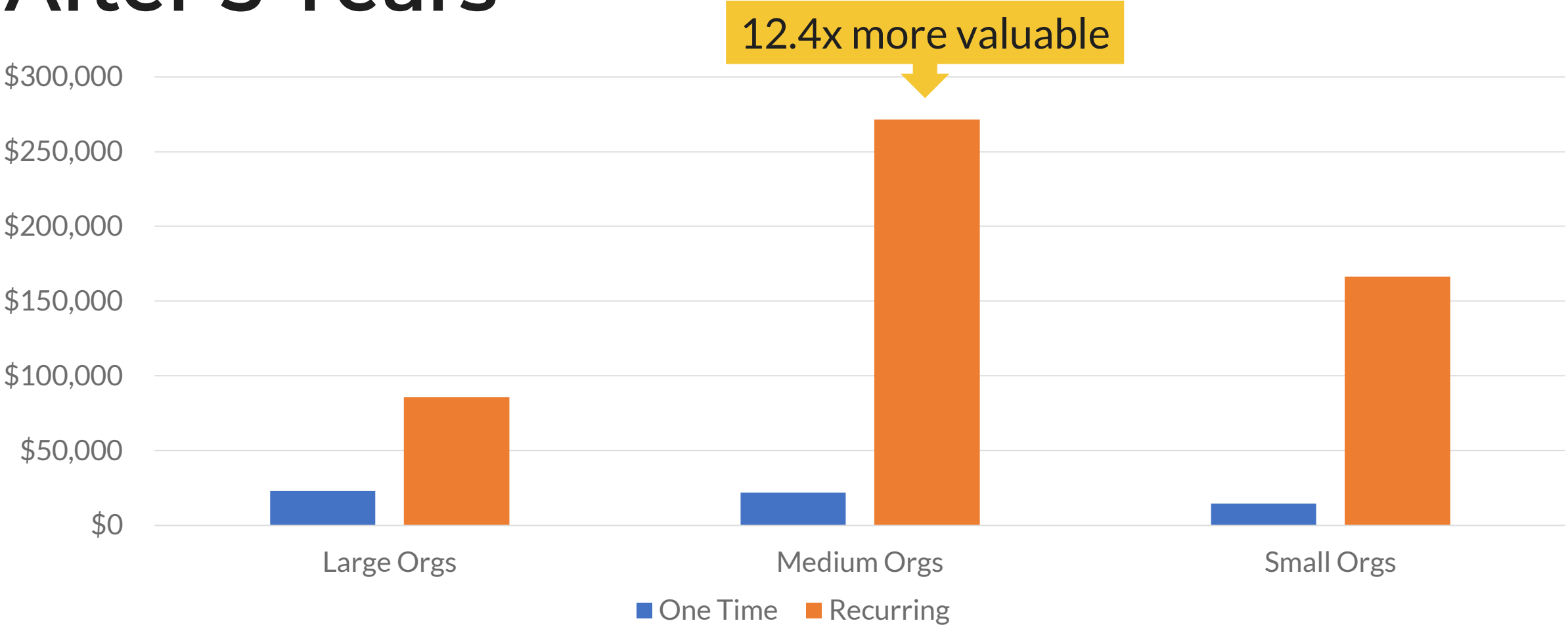
# Cumulative Revenue per 1,000 Donors After 5 Years



# Cumulative Revenue per 1,000 Donors After 5 Years



# Cumulative Revenue per 1,000 Donors After 5 Years





# Cumulative Revenue per 1,000 Donors After 5 Years

\$300,000

**RECURRING DONORS ARE EVEN MORE VALUABLE FOR SMALL AND MEDIUM SIZED ORGANIZATIONS.**

\$0

Large Orgs

Medium Orgs

Small Orgs

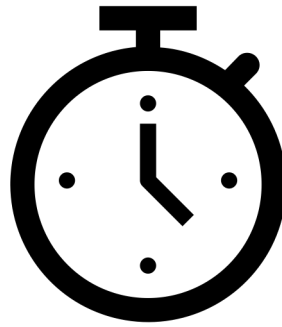
■ One Time ■ Recurring

JUST IN CASE THAT  
WASN'T ENOUGH...

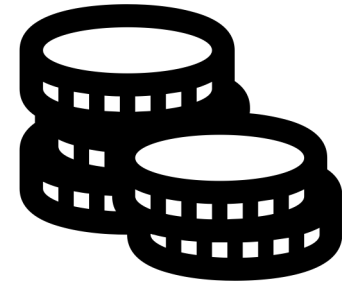
# More Reasons Why Recurring Giving Is Good For You



RELATIONSHIP



PREDICTABLE



COST SAVINGS



RECURRING GIVING IS  
GOOD FOR DONORS.

# TO THE SCIENCE!



## THE SCIENCE OF GIVING

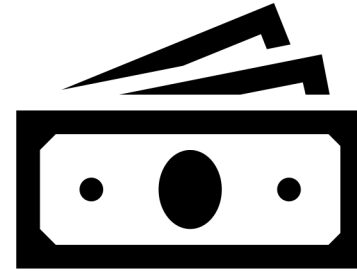
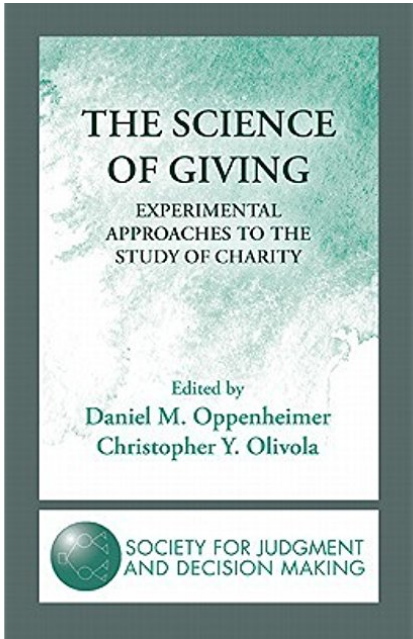
EXPERIMENTAL  
APPROACHES TO THE  
STUDY OF CHARITY

Edited by  
Daniel M. Oppenheimer  
Christopher Y. Olivola



SOCIETY FOR JUDGMENT  
AND DECISION MAKING

# TO THE SCIENCE!



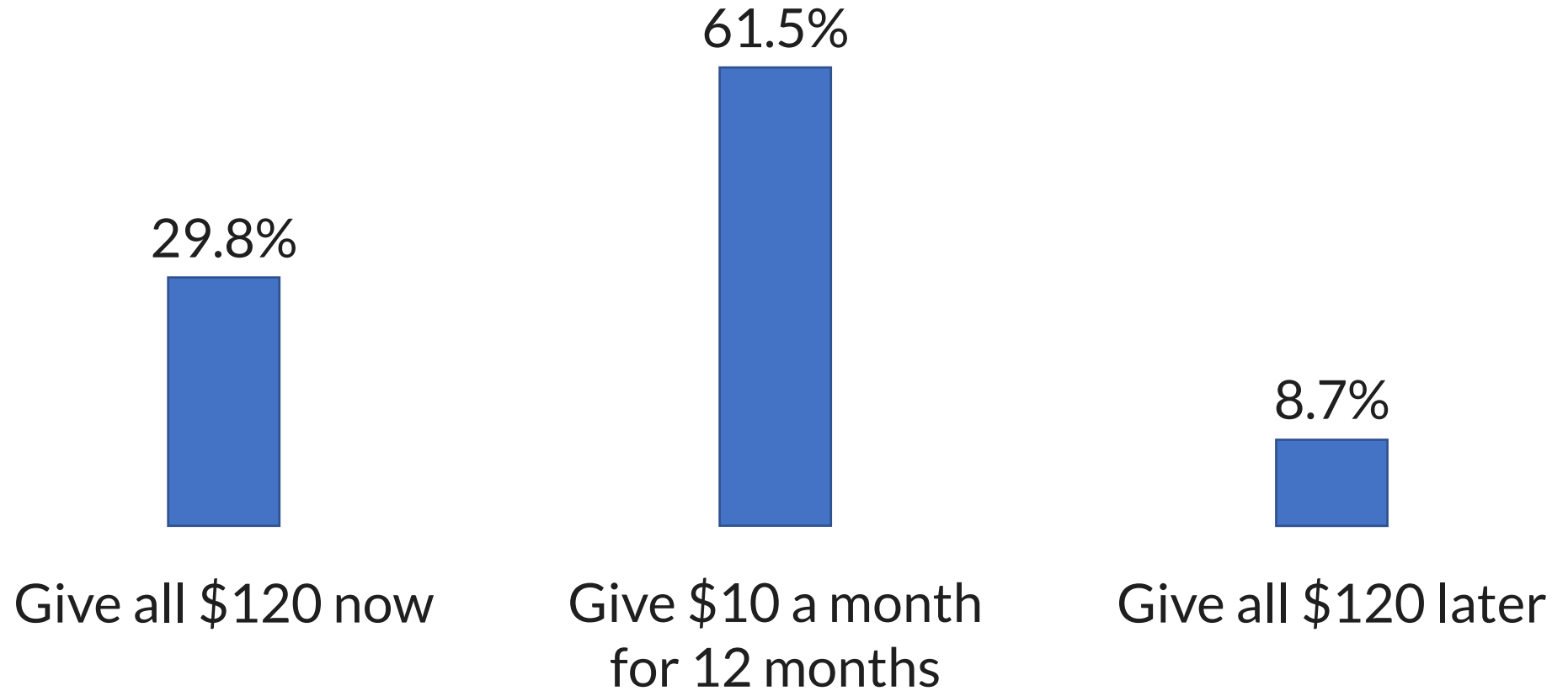
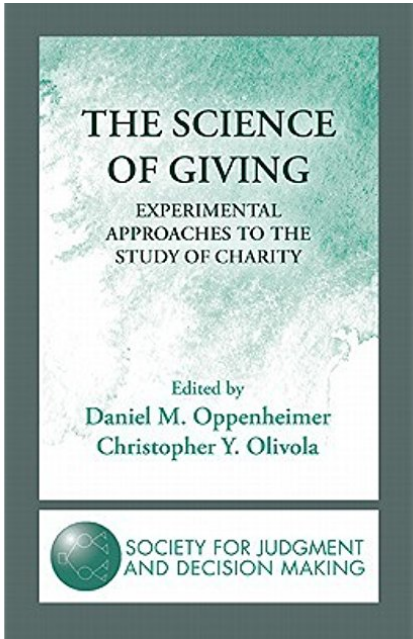
\$120

Give all \$120 now

Give all \$120 later

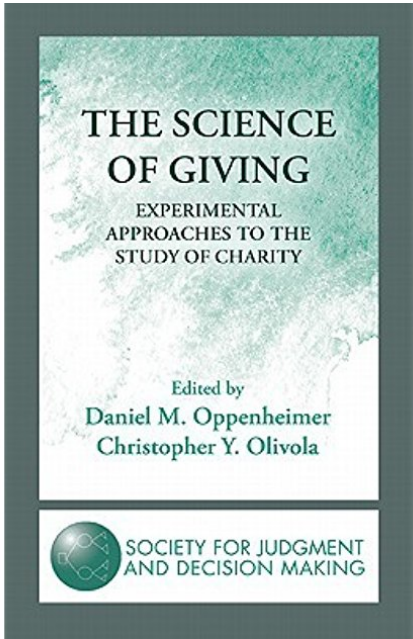
Give \$10 a month for 12 months

# TO THE SCIENCE!





# TO THE SCIENCE!



**PAYING IN INSTALLMENTS  
OVER TIME IS MENTALLY  
CONVENIENT.**

# TO THE SCIENCE!



## THE SCIENCE OF GIVING

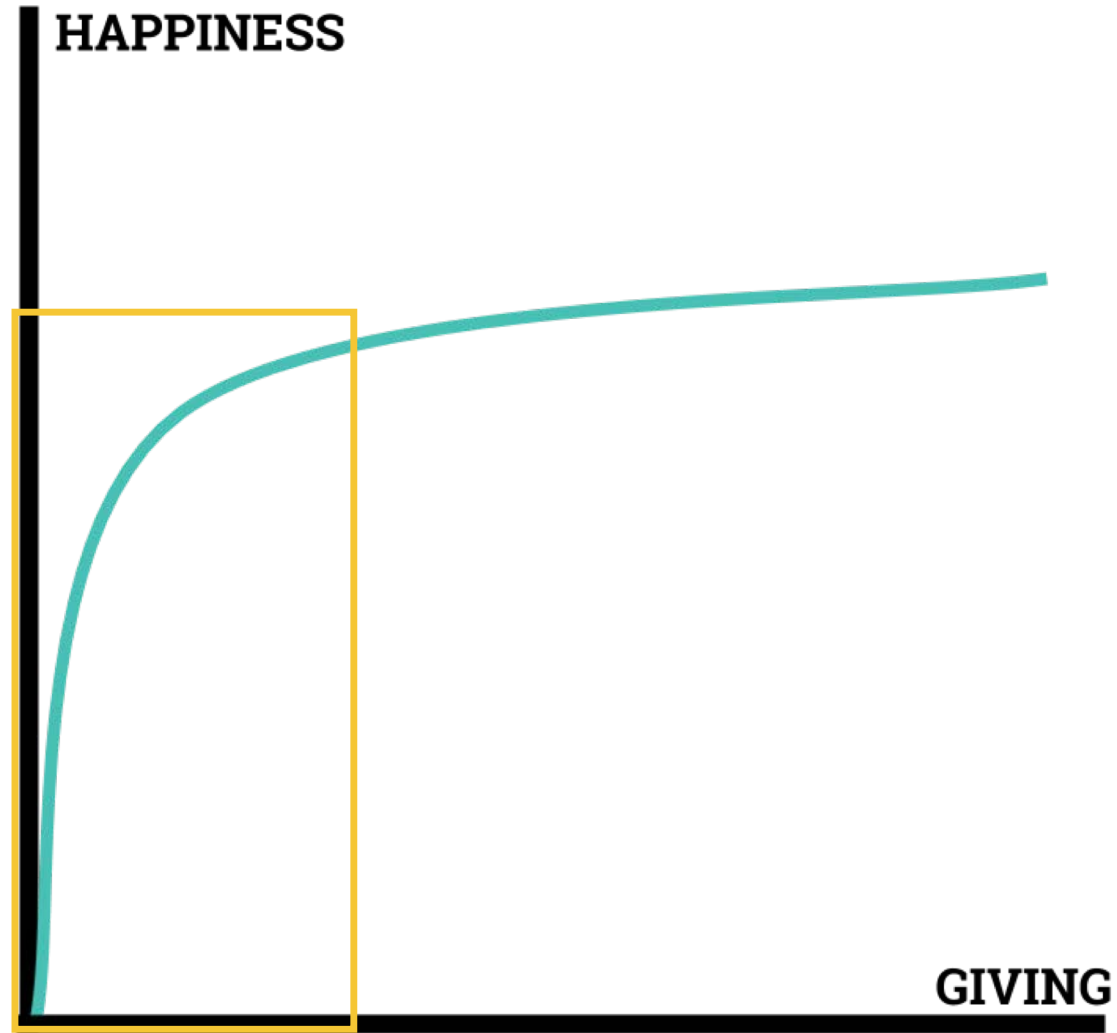
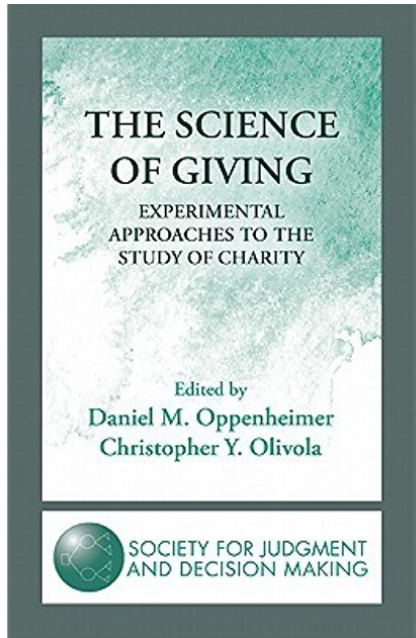
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SOCIETY FOR JUDGMENT  
AND DECISION MAKING

# TO THE SCIENCE!





RECURRING GIVING  
**MAXIMIZES** HAPPINESS  
AND PERCEIVED **IMPACT.**

RECURRING GIVING IS A  
HIGH-CONVENIENCE AND  
HIGH-IMPACT WAY FOR  
DONORS TO GIVE.

RECURRING GIVING IS  
GROWING FAST.

RECURRING GIVING REVENUE  
**GREW 40%** IN 2017 FROM 2016.



RECURRING GIVING REVENUE  
HAS **GROWN 70%** SINCE 2013.

THE SUBSCRIPTION E-COMMERCE  
MARKET HAS **GROWN BY MORE THAN  
100%** PERCENT A YEAR OVER THE PAST  
FIVE YEARS.

DOLLAR SHAVE CLUB

Canada

Menu

Home

Blades

Products

How It Works

Login


Join The Club

Box

How It Works


Choose one of our three amazing razors. We'll give you a reusable handle and ship you replacement razor cartridges for a ridiculously affordable price. Add on one of our other bathroom products whenever you want. See, easy.

TRY THE CLUB




CHOOSE YOUR RAZOR

We've got a twin blade, 4-blade, and 6-blade option. They're all amazing.




AFTER YOUR FIRST MONTH...

Replacement razor cartridges ship automatically every month at the regular price (\$3.50, \$6.50, or \$9.50).




NO LONG TERM COMMITMENTS

"You can cancel your Membership anytime with a few clicks. Questions? Concerns? Our world class Club Pros are here for you."




ON YOUR SCHEDULE

Whether you sport stubble, have a beard, or shave daily there's a delivery frequency for you.



YOUR BATHROOM IN A BOX

We make and deliver everything you need in the bathroom. It doesn't get more convenient.



100% MONEY-BACK GUARANTEE

If you're not happy with anything for any reason, we'll refund your money. All of it.

By now you're probably convinced of the wisdom of joining the club.

TRY THE CLUB

Discover Your New Favorite Eye Shadow.

5 Beauty Products | Only \$10/month | Free Shipping\*

GET STARTED

\* Within the U.S.

## Unpack your box

We guarantee the freshness of all our ingredients and deliver them in an insulated box right to your door.

## Choose your meals

Our chef-designed recipes include balanced Mediterranean meals, quick one-pan dinners, and top-rated customer favorites.

## Create magic

Following our step-by-step instructions you'll experience the magic of cooking recipes that our chefs create with your family's tastes in mind.

RECURRING GIVING IS STARTING  
TO **GROW RAPIDLY** AND SHOULD  
CONTINUE TO DO SO.



# WHAT DO YOU NEED TO KNOW ABOUT THIS STUDY?

# The Methodology

1. Identified over 100 different nonprofit organizations
2. Gave three different gifts from three different donors
3. Monitor the communications across four channels
4. Report one card as lost and another is cancelled
5. Analyze the results

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# The Nonprofits



**115**

Total Organizations



**106**

Accept Recurring Gifts



**9**

Different Verticals



# Organization Notes

- **Annual Revenue Range:** \$526,628 – \$3,065,298,466
- **Average Annual Revenues:** \$181,391,023 (\$48,359,612 median)
- **Represented Verticals:**

Christian Ministry	15	Human and Social Services	10
Disaster & International Relief	23	Public and Social Benefit	10
Disease and Health Services	14	Public Broadcasting	11
Education	9	Public Policy / Advocacy	12
Environment and Wildlife	12		

# The Methodology

1. Identified over 100 different nonprofit organizations
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3. Monitor the communications across four channels
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# The Donors

## ONE-TIME DONOR



- One-time donor

## UPGRADED DONOR



- Initially a one-time donor
- Converted to recurring donor in second month

## RECURRING DONOR



- Recurring donor

# The Methodology

1. Identified over 100 different nonprofit organizations
2. Gave three different gifts from three different donors
- 3. Monitor the communications across four channels**
4. Report one card as lost and another is cancelled
5. Analyze the results

# The Comm. Channels



**534**

Direct Mail Letters



**4,117**

Emails



**83**

Phone Calls  
(33 Voicemails)



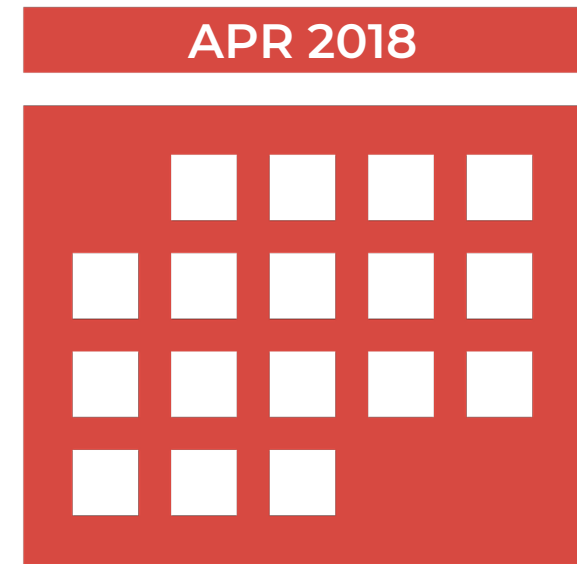
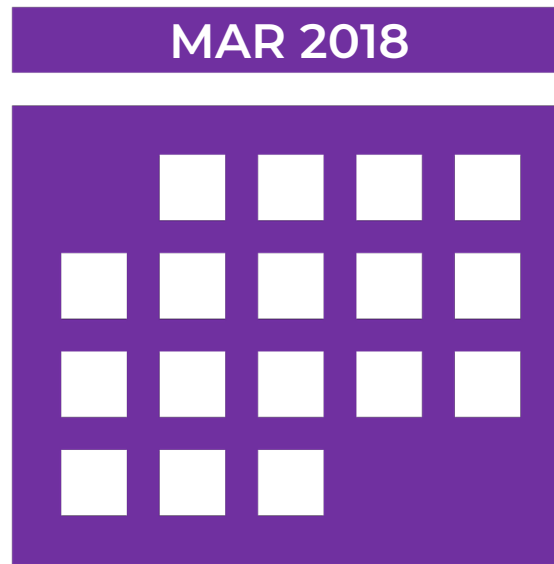
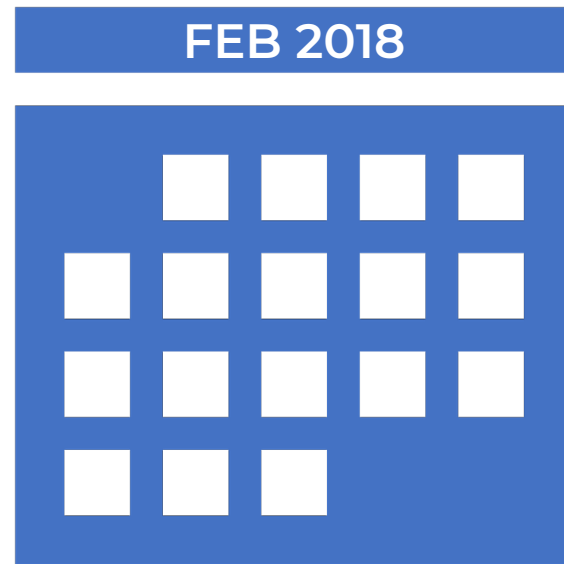
**6**

Text Messages



# Communications Analysis Timeline

- Each of our donors made their first gift at the start of February 2018
- Communications were analyzed for the following three months (though April 2018)



# The Methodology

1. Identified over 100 different nonprofit organizations
2. Gave three different gifts from three different donors
3. Monitor the communications across four channels
4. **Report one card as lost and another is cancelled**
5. Analyze the results

# The Methodology

1. Identified over 100 different nonprofit organizations
2. Gave three different gifts from three different donors
3. Monitor the communications across four channels
4. Report one card as lost and another is cancelled
5. **Analyze the results**

# Analyzing the Results

- Cataloged the conversion process
- Scanned and exported every letter, email, and voicemail
- Recorded communication details like date received, sender, etc.
- Categorized every communication

- Solicitation
- Cultivation
- Receipt

Organization	Recipient	Date Received	Channel	Image	Communication Type
World Hub	Kevin Peters	4/18/18	Direct Mail	20180509094655_001	Cultivation
World Hub	Paul Cleave	4/18/18	Direct Mail	20180509094655_001	Cultivation
InTouch Ministries	Paul Cleave	4/18/18	Direct Mail	20180509103113_001	Cultivation
InTouch Ministries	Jeff Giddens	4/18/18	Direct Mail	20180509103113_001	Cultivation
InTouch Ministries	Kevin Peters	4/18/18	Direct Mail	20180509103113_001	Cultivation
WGBH Educational Foundation	Kevin Peters	3/28/18	Direct Mail	20180509113637_001	Cultivation
InTouch Ministries	Paul Cleave	4/18/18	Direct Mail	20180509114953_001	Cultivation
Moody Bible Ministries	Jeff Giddens	4/8/18	Direct Mail	20180509115221_001	Cultivation
InTouch Ministries	Jeff Giddens	3/30/18	Direct Mail	20180509115419_001	Cultivation
InTouch Ministries	Kevin Peters	3/30/18	Direct Mail	20180509115419_001	Cultivation
InTouch Ministries	Paul Cleave	3/30/18	Direct Mail	20180509115419_001	Cultivation
Investmental Defense Fund	Paul Cleave	3/12/18	Direct Mail	20180509115646_002	Cultivation
Horizon Policy Center, Inc.	Paul Cleave	2/8/18	Direct Mail	20180509125019_001	Receipt
Commission International	Paul Cleave	3/21/18	Direct Mail	20180509130153_001	Solicitation
Focus on the Family	Paul Cleave	3/21/18	Direct Mail	20180509130326_001	Cultivation
Voice of the Martyrs	Paul Cleave	3/7/18	Direct Mail	20180509130608_001	Cultivation
InTouch Ministries	Jeff Giddens	2/16/18	Direct Mail	20180509131121_001	Cultivation
InTouch Ministries	Paul Cleave	2/16/18	Direct Mail	20180509131121_001	Cultivation
TPT (Missouri PBS)	Kevin Peters	3/28/18	Direct Mail	20180509131406_001	Cultivation
TPT (Missouri PBS)	Paul Cleave	2/28/19	Direct Mail	20180510082452_001	Cultivation
TPT (Missouri PBS)	Jeff Giddens	2/28/18	Direct Mail	20180510082452_001	Cultivation
TPT (Missouri PBS)	Kevin Peters	2/28/18	Direct Mail	20180510082452_001	Cultivation
Sierra Club	Paul Cleave	3/12/18	Direct Mail	20180510082608_001	Cultivation
Southern Poverty Law Center	Kevin Peters	3/21/18	Direct Mail	20180510083132_001	Cultivation
WGBH Educational Foundation	Kevin Peters	3/18/18	Direct Mail	20180510083238_001	Cultivation
TPT (Missouri PBS)	Paul Cleave	3/30/18	Direct Mail	20180510083408_001	Cultivation
Southern Poverty Law Center	Paul Cleave	3/12/18	Direct Mail	20180510083903_001	Cultivation
Southern Poverty Law Center	Jeff Giddens	3/12/18	Direct Mail	20180510083903_001	Cultivation
Surfside Foundation	Kevin Peters	4/30/18	Direct Mail	20180510091712_001	Cultivation
International Justice Mission	Kevin Peters	4/30/18	Direct Mail	20180510091909_001	Cultivation
Focus on the Family	Jeff Giddens	3/28/18	Direct Mail	20180510092227_001	Cultivation
Sierra Club	Jeff Giddens	3/21/18	Direct Mail	20180510092422_001	Cultivation
WGBH Educational Foundation	Kevin Peters	4/24/18	Direct Mail	20180510092603_001	Cultivation
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Sierra Club	Paul Cleave	4/26/18	Direct Mail	20180510092911_001	Cultivation
Rawns Foundation	Paul Cleave	4/26/18	Direct Mail	20180510093050_001	Cultivation
Voice of the Martyrs	Jeff Giddens	4/30/18	Direct Mail	20180510093649_001	Cultivation

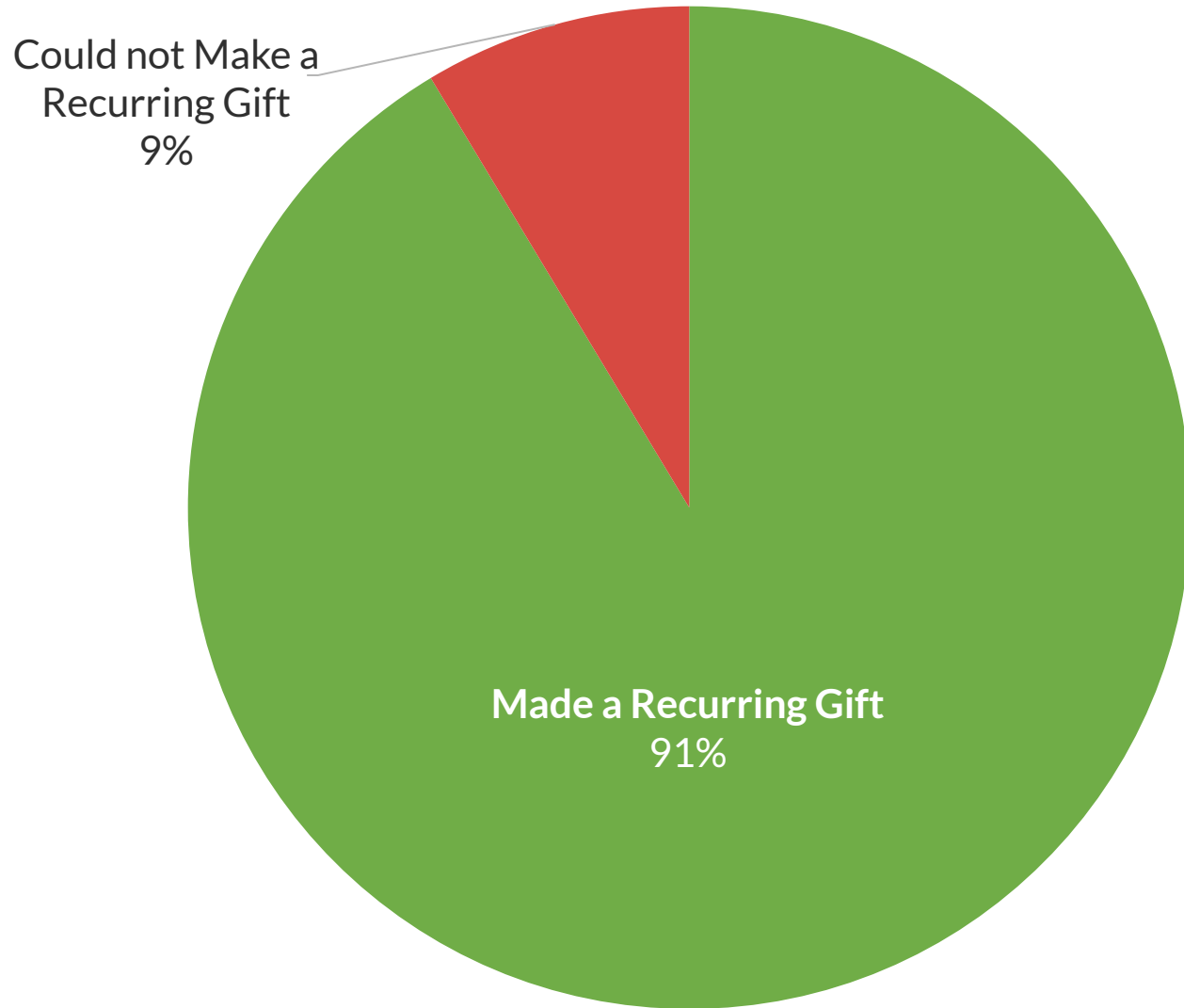
KQED (Northern California PBS)	Public Broadcasting	<a href="http://www.kqed.org/">http://www.kqed.org/</a>	Justin	Complete	4/28/18	Direct Mail	20180510093649_001	Cultivation
KUOW	Public Broadcasting	<a href="http://www.kuow.org/">http://www.kuow.org/</a>	Dan	Complete	3/7/18	Direct Mail	20180510094313_001	Cultivation
Leukemia & Lymphoma Society	Disease and Health Services	<a href="http://www.lls.org/">http://www.lls.org/</a>	Dan	Complete	4/30/18	Direct Mail	20180510094925_001	Cultivation
Melale Fund	Education	<a href="https://www.melale.org/">https://www.melale.org/</a>	Dan	Complete	3/30/18	Direct Mail	20180510095055_001	Cultivation
Moody Global Ministries	Christian Ministry	<a href="https://www.moodyglobal.org">https://www.moodyglobal.org</a>	Dan	Complete	3/30/18	Direct Mail	20180510095055_001	Cultivation
Mosaic	Human and Social Services	<a href="https://www.mosaicinfo.org/">https://www.mosaicinfo.org/</a>	Dan	Only One-time Giving	2/22/18	Direct Mail	20180510095240_001	Cultivation
Mothers Against Drunk Driving Inc	Public Policy / Advocacy	<a href="https://www.madd.org/">https://www.madd.org/</a>	Dan	Complete	4/30/18	Direct Mail	20180510102430_001	Cultivation
Multiple Myeloma Research Foundation	Disease and Health Services	<a href="https://www.themmmf.org/">https://www.themmmf.org/</a>	Dan	Complete	4/30/18	Direct Mail	20180510102732_001	Cultivation
Muscular Dystrophy Association	Disease and Health Services	<a href="https://www.mda.org/">https://www.mda.org/</a>	Dan	Complete	4/30/18	Direct Mail	20180510102826_001	Cultivation
	Environment and Wildlife	<a href="https://www.aqua.org/">https://www.aqua.org/</a>	Dan	Complete	4/24/18	Direct Mail	20180510104015_001	Cultivation
	Human and Social Services	<a href="http://www.thehotline.org/">http://www.thehotline.org/</a>	Dan	Complete	2/26/18	Direct Mail	20180510121304_001	Receipt
	Environment and Wildlife	<a href="https://www.nationalparks.org/">https://www.nationalparks.org/</a>	Dan	Complete	3/9/18	Direct Mail	2018051014320_001	Cultivation
	Public and Social Benefit	<a href="https://www.norwichpress.org/">https://www.norwichpress.org/</a>	Allison	Complete	2/16/18	Direct Mail	2018051014558_001	Cultivation
	Public Broadcasting	<a href="https://www.norwichpress.org/">https://www.norwichpress.org/</a>	Allison	Complete	2/21/18	Direct Mail	2018051014824_001	Receipt
	Human and Social Services	<a href="https://www.nrbf.org/">https://www.nrbf.org/</a>	Allison	Complete	3/21/18	Direct Mail	20180510121853_001	Receipt
	Disease and Health Services	<a href="http://www.latrobe.edu.au/oltrc">http://www.latrobe.edu.au/oltrc</a>	Allison	Only One-time Giving	4/8/18	Direct Mail	20180510130401_001	Cultivation
	Education	<a href="https://www.onsopaideducation.org/">https://www.onsopaideducation.org/</a>	Allison	Complete	4/9/18	Direct Mail	20180510132663_001	Cultivation
	Christian Ministry	<a href="http://www.opendreams.org">www.opendreams.org</a>	Allison	Complete	4/9/18	Direct Mail	20180510132663_001	Cultivation
	Disaster & International Relief	<a href="https://www.opportunity.org">https://www.opportunity.org</a>	Allison	Complete	2/16/18	Direct Mail	20180510133400_001	Cultivation
	Education	<a href="https://www.perspectives.org/">https://www.perspectives.org/</a>	Allison	Only One-time Giving	4/8/18	Direct Mail	2018051014522_001	Cultivation
	Disaster & International Relief	<a href="https://www.planusa.org/">https://www.planusa.org/</a>	Allison	Complete	4/5/18	Direct Mail	2018051015419_001	Receipt
	Disease and Health Services	<a href="https://www.plannedparenthood.org/">https://www.plannedparenthood.org/</a>	Allison	Complete	4/8/18	Direct Mail	20180510155837_001	Cultivation
	Human and Social Services	<a href="https://www.psalternet.org/">https://www.psalternet.org/</a>	Allison	Complete	4/3/18	Direct Mail	20180510160138_001	Cultivation
	Christian Ministry	<a href="http://www.psalternet.org/">http://www.psalternet.org/</a>	Allison	Complete	4/8/18	Direct Mail	20180510160746_001	Cultivation
	Disaster & International Relief	<a href="http://www.psl.org">http://www.psl.org</a>	Paul	Complete	4/8/18	Direct Mail	20180510160746_001	Cultivation
	Public Policy / Advocacy	<a href="https://www.psl.org">https://www.psl.org</a>	Paul	Complete	4/8/18	Direct Mail	20180510160746_001	Cultivation
	Public and Social Benefit	<a href="http://www.psl.org">http://www.psl.org</a>	Paul	Complete	4/10/18	Direct Mail	20180510162027_001	Solicitation
	Disaster & International Relief	<a href="https://www.safetechildren.org/">https://www.safetechildren.org/</a>	Paul	Complete	4/3/2018	Direct Mail	20180525122943_001	Cultivation
	Education	<a href="https://www.safetechildren.org/">https://www.safetechildren.org/</a>	Paul	Complete	4/10/18	Direct Mail	20180525134455_001	Cultivation
	Disaster & International Relief	<a href="https://www.safetechildren.org/">https://www.safetechildren.org/</a>	Paul	Complete	4/9/2018	Direct Mail	20180525134714_001	Cultivation
	Environment and Wildlife	<a href="http://www.sierraclub.org/">http://www.sierraclub.org/</a>	Paul	Only One-time Giving	3/26/18	Direct Mail	20180525155445_001	Cultivation
	Disaster & International Relief	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Paul	Complete	3/21/18	Direct Mail	20180525155715_001	Cultivation
	Public Policy / Advocacy	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Paul	Complete	3/21/18	Direct Mail	20180525155823_001	Cultivation
	Disease and Health Services	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Paul	Complete	3/18/18	Direct Mail	20180525155930_001	Cultivation
	Environment and Wildlife	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Brady	Complete				
	Disease and Health Services	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Brady	Complete				
	Education	<a href="https://www.solarcenter.org/">https://www.solarcenter.org/</a>	Brady	Complete				

# WHAT WE LEARNED ABOUT RECURRING GIVING.



A person is seen from behind, wearing a blue and white striped sweater. The background is a wall covered with numerous sticky notes, some with diagrams and text, creating a complex, cluttered visual. The entire image has a blue tint.

**1. IT'S NOT THAT EASY TO  
FIND OUT WHERE TO MAKE  
A RECURRING DONATION.**

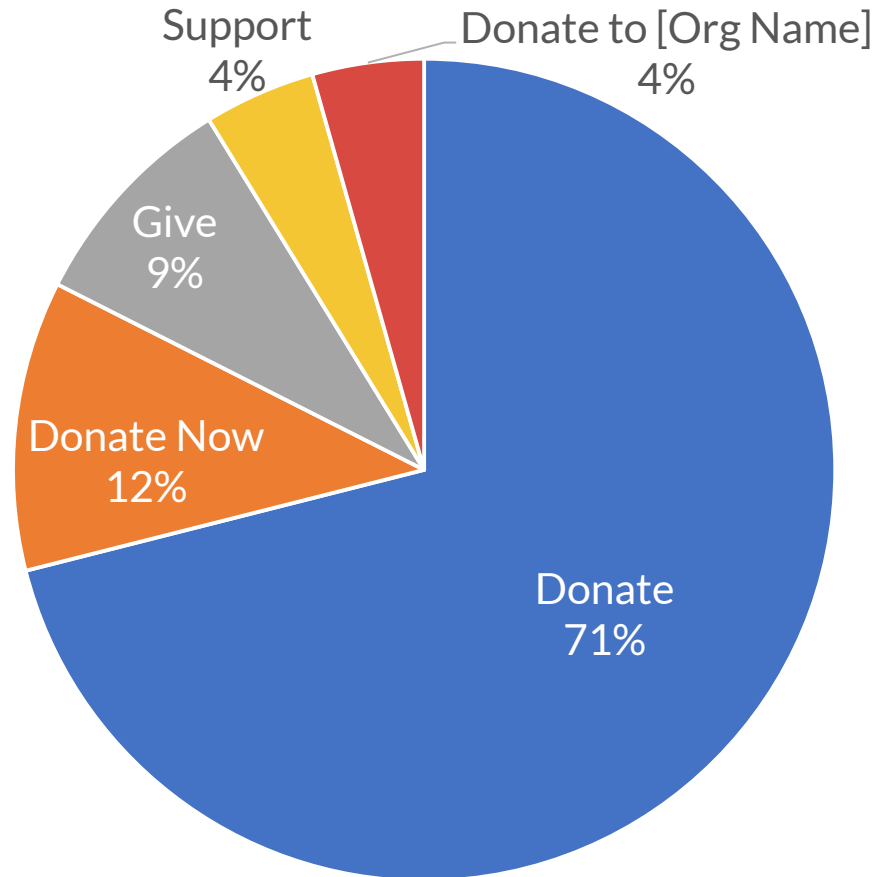


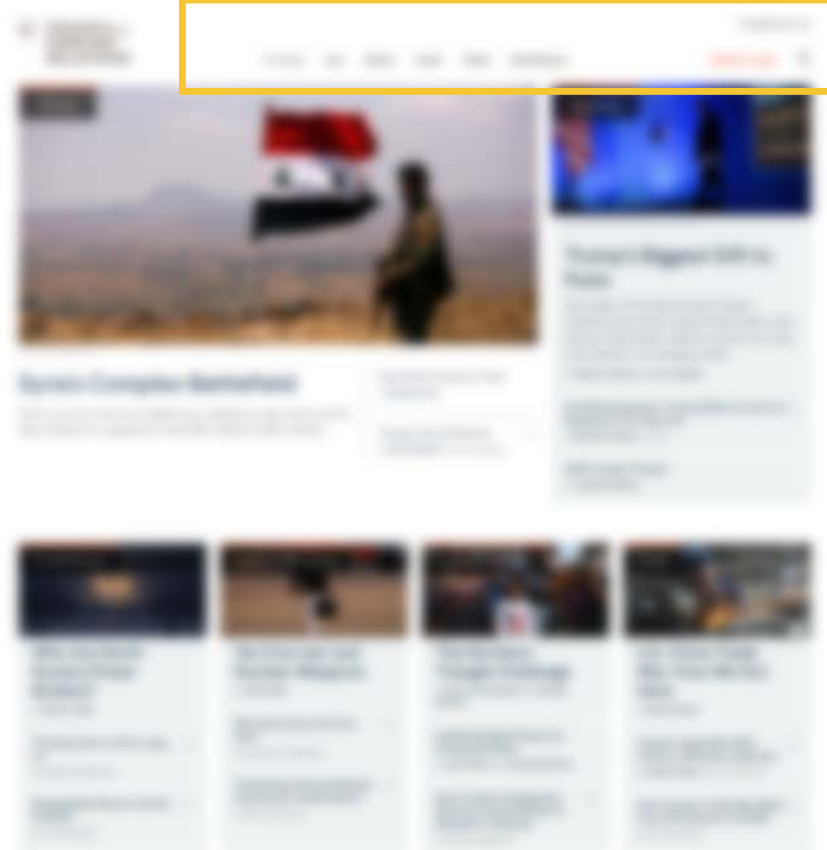
Roughly 1 out of 10 organizations did not have a recurring gift option online.

A man with a beard and mustache, wearing a red military uniform with a black peaked cap and several medals on his chest, has a surprised expression with wide eyes and an open mouth. The background is a blurred indoor setting.

**TRY HAVING AN OPTION  
FOR RECURRING GIVING.**

# Donation Button Call-to-Action







## Explainers

100%



The Star of David is a symbol of Judaism. It is a six-pointed star, also known as the Star of David, which is a symbol of the Jewish people. It is often used to represent the Jewish faith and is a common symbol in Jewish religious and cultural contexts.

Section titled "Explainers" with three items:

- Item 1: A person in a red shirt.
- Item 2: A person in a blue shirt.
- Item 3: A person in a green shirt.

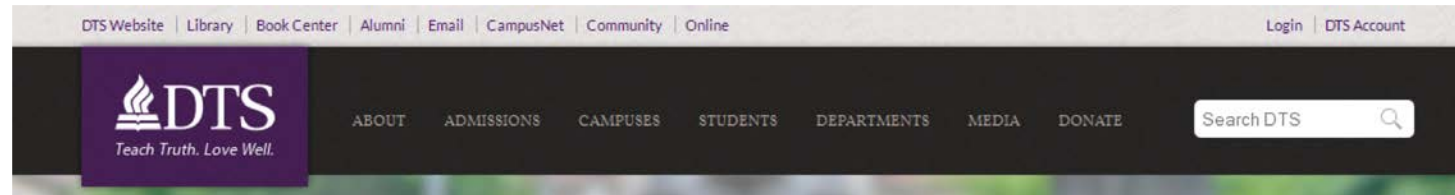
Section titled "Explainers" with three items:

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- Item 3: A person in a green shirt.

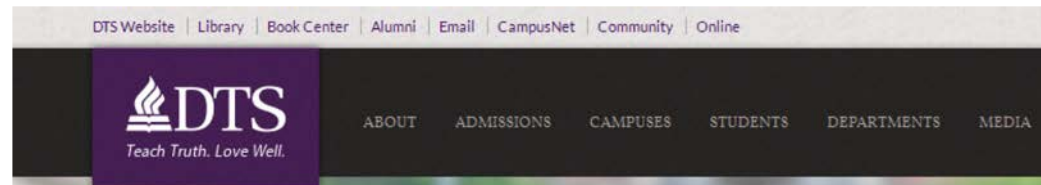
# How Visually Emphasizing The Donate Button Affects Traffic

Experiment ID: #1698

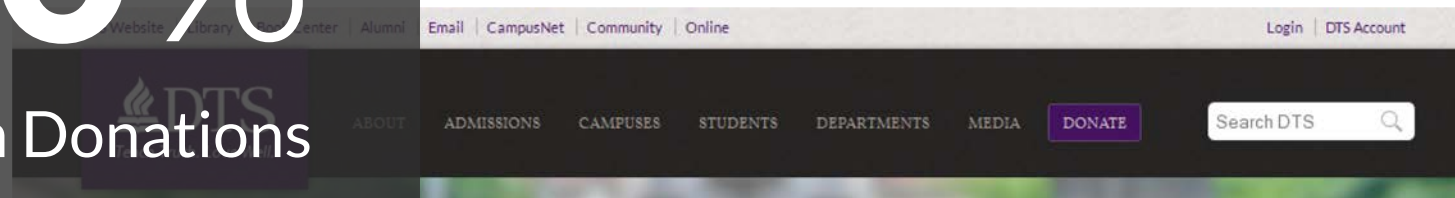
## CONTROL



## TREATMENT #1

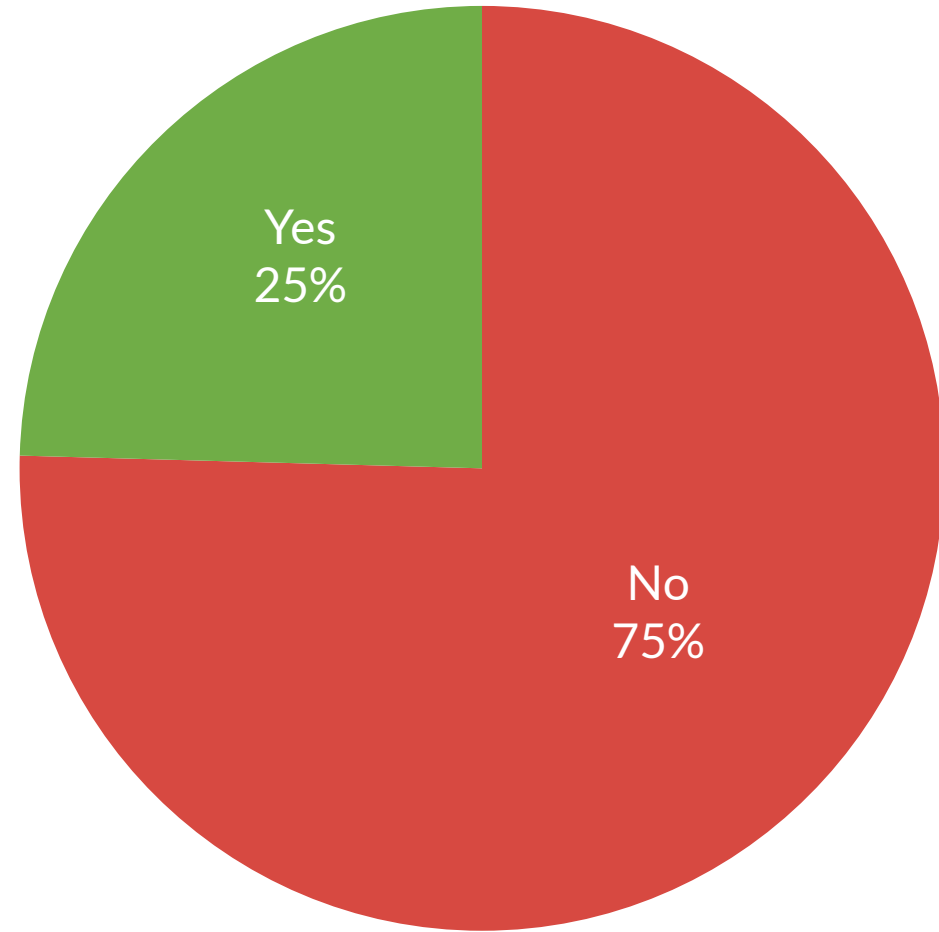


## TREATMENT #2



**TRY HAVING A CLEAR DONATE  
BUTTON IN YOUR NAVIGATION.**

3 out of 4  
organizations do  
*not* have a separate  
call-to action-for  
recurring  
donations.



# How Changing The Website Navigation To Address Multiple Segments Affects Traffic

Experiment ID: #2325

## CONTROL

Members Only Area



Membership

Resource Center

## TREATMENT

Members Only Area



Search

☒ Handbook ☐ Site

Resource Center



16%

In Donation Clicks



# How Addressing A New Segment Of Donors On The Homepage Impacted Donor Conversion

Experiment ID: #6446

## CONTROL



## TREATMENT



46%

In Donations

**TRY ADDING A SPECIFIC  
CTA/BUTTON FOR RECURRING  
GIFTS IN YOUR NAVIGATION.**

# CHILD SPONSORSHIP CHANGES LIVES!

You can make an eternal difference in the life of a child in need. Sponsor a Child TODAY!

[LEARN MORE →](#)



A person is seen from behind, wearing a blue and white striped sweater. The background is a wall covered in numerous sticky notes, some with diagrams and text, creating a brainstorming or planning environment. The entire image has a blue tint.

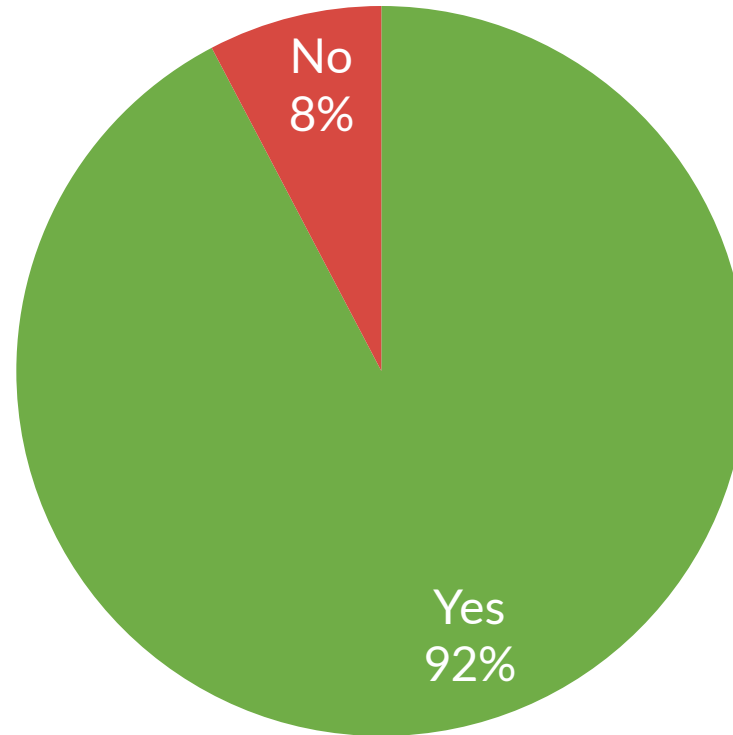
**2. IT'S NOT CLEAR WHY YOU  
SHOULD BECOME A  
RECURRING DONOR.**

**WHY SHOULD I GIVE TO YOU,  
RATHER THAN SOME OTHER  
ORGANIZATION, OR NOT AT ALL?**



WHY SHOULD I GIVE A RECURRING GIFT  
TO YOU, **INSTEAD OF A ONE-TIME  
DONATION**, AND RATHER THAN SOME  
OTHER ORGANIZATION, OR NOT AT ALL?

# On The One-time Donate Page, Do They Have An Option To Give A Recurring Gift?



# How Did They Communicate The Recurring Giving Option?

“Yes, automatically repeat this gift every month.”

“Become a monthly donor”

“I would like this to be a monthly gift.”

“Monthly Gift”

“Ongoing Monthly”

“A monthly gift does even more to protect civil liberties.”

“Make this a recurring gift”

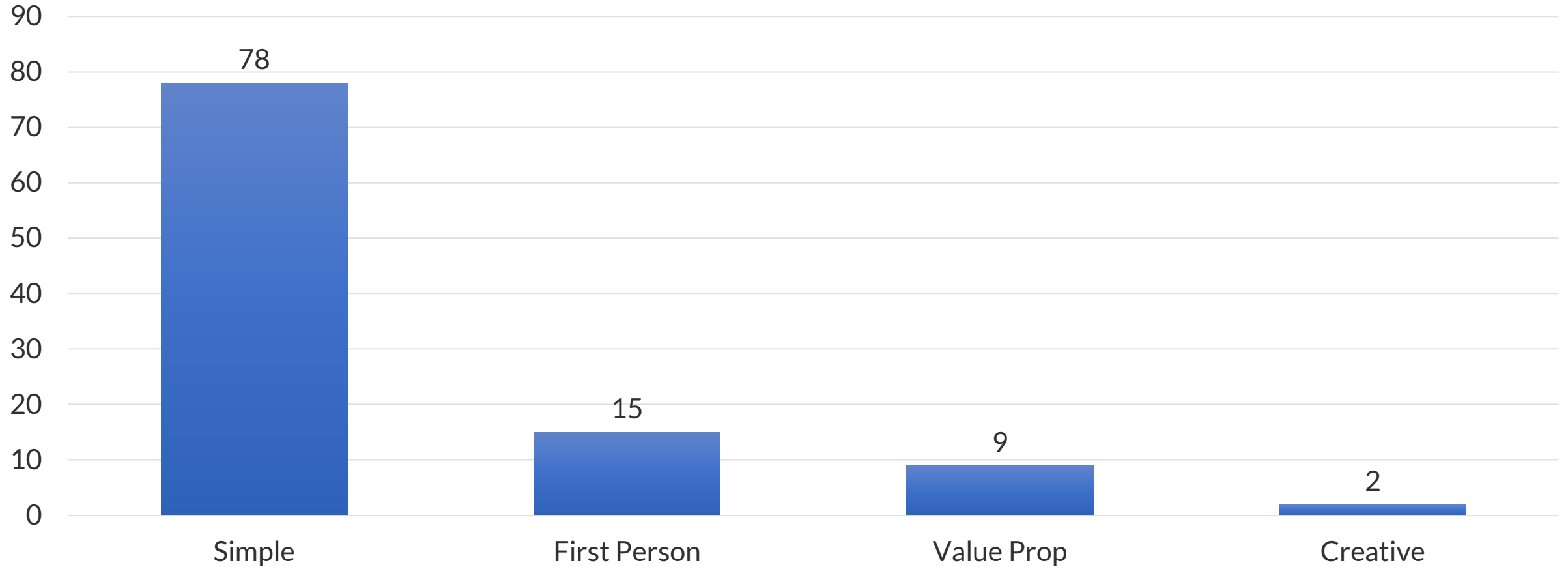
“Make a Monthly Donation”

“Yes, please make this a monthly gift to ORG.”

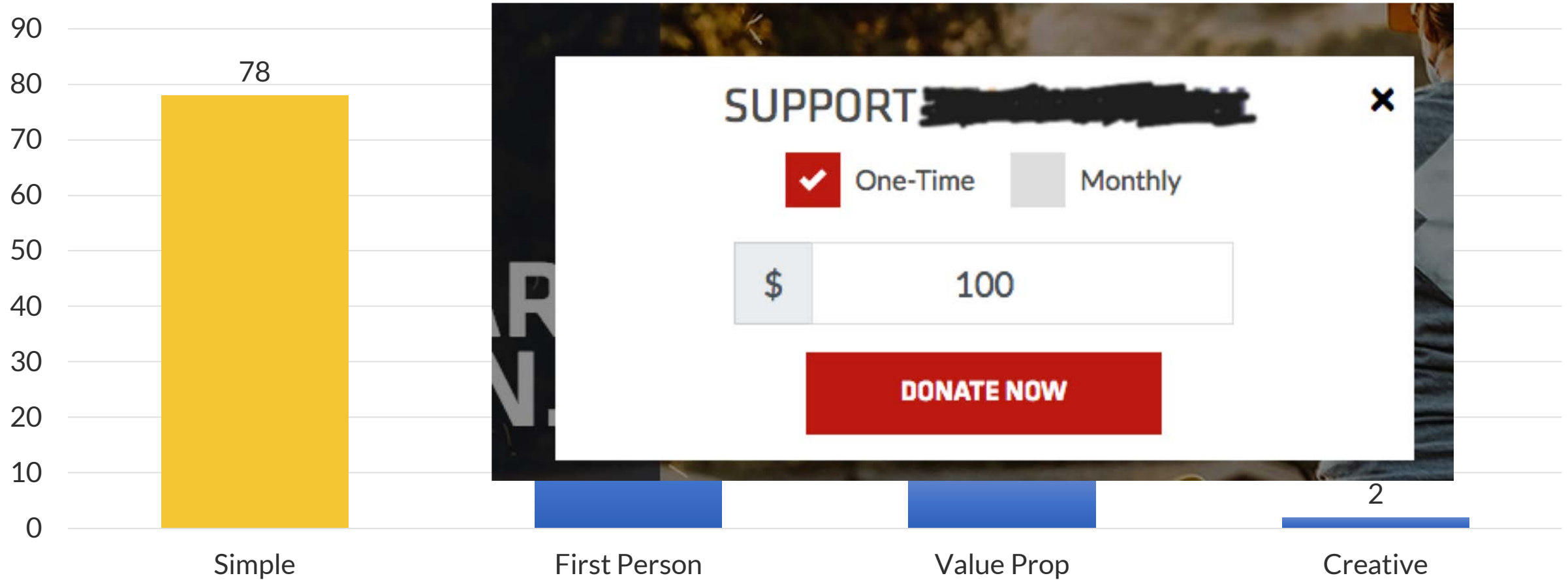
“Donate monthly”

“Make your gift go further. Give monthly.”

# Style of Recurring Gift Text



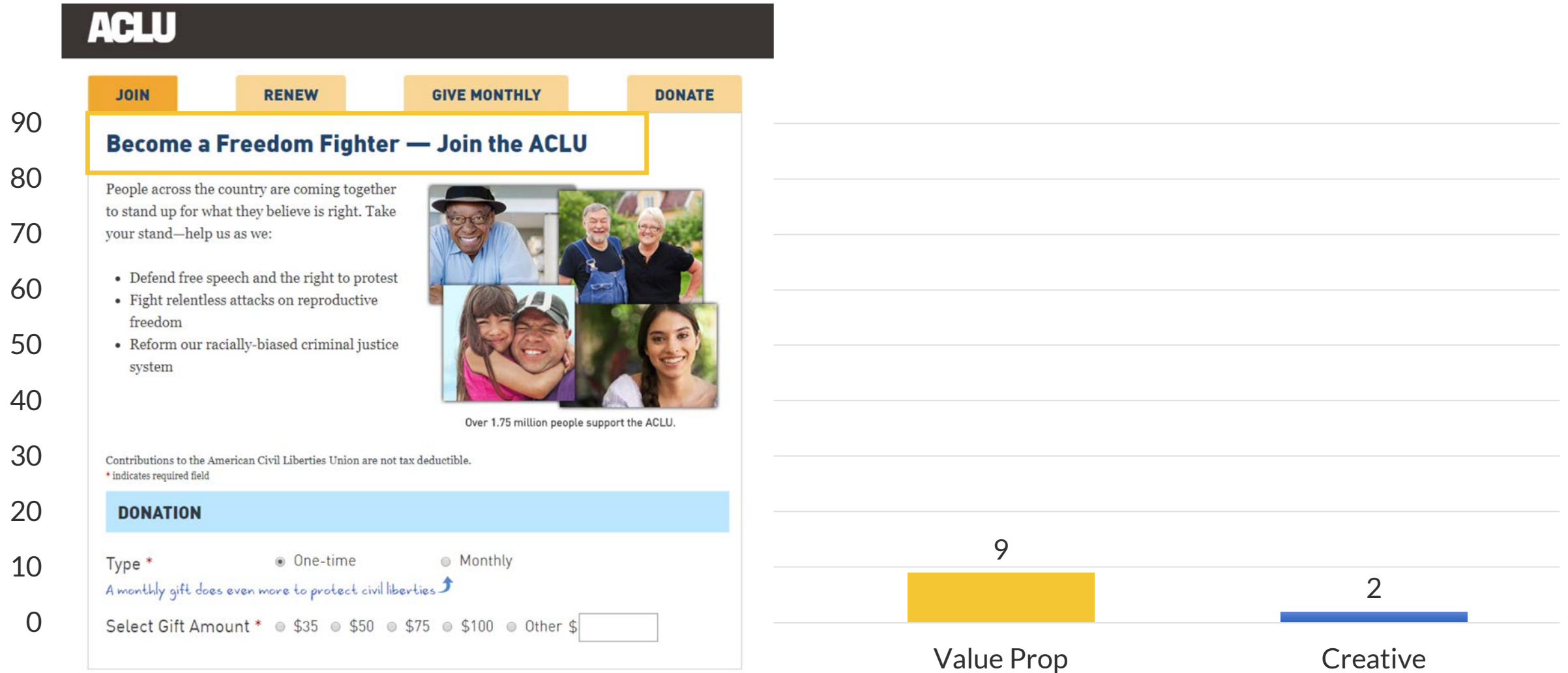
# Style of Recurring Gift Text





WHY SHOULD I GIVE A RECURRING GIFT  
TO YOU, INSTEAD OF A ONE-TIME  
DONATION, AND RATHER THAN SOME  
OTHER ORGANIZATION, OR NOT AT ALL?

# Style of Recurring Gift Text



# Style of Recurring Gift Text

**ACLU**

**JOIN** **RENEW** **GIVE MONTHLY** **DONATE**

## Become a Freedom Fighter — Join the ACLU

People across the country are coming together to stand up for what they believe is right. Take your stand—help us as we:

- Defend free speech and the right to protest
- Fight relentless attacks on reproductive freedom
- Reform our racially-biased criminal justice system



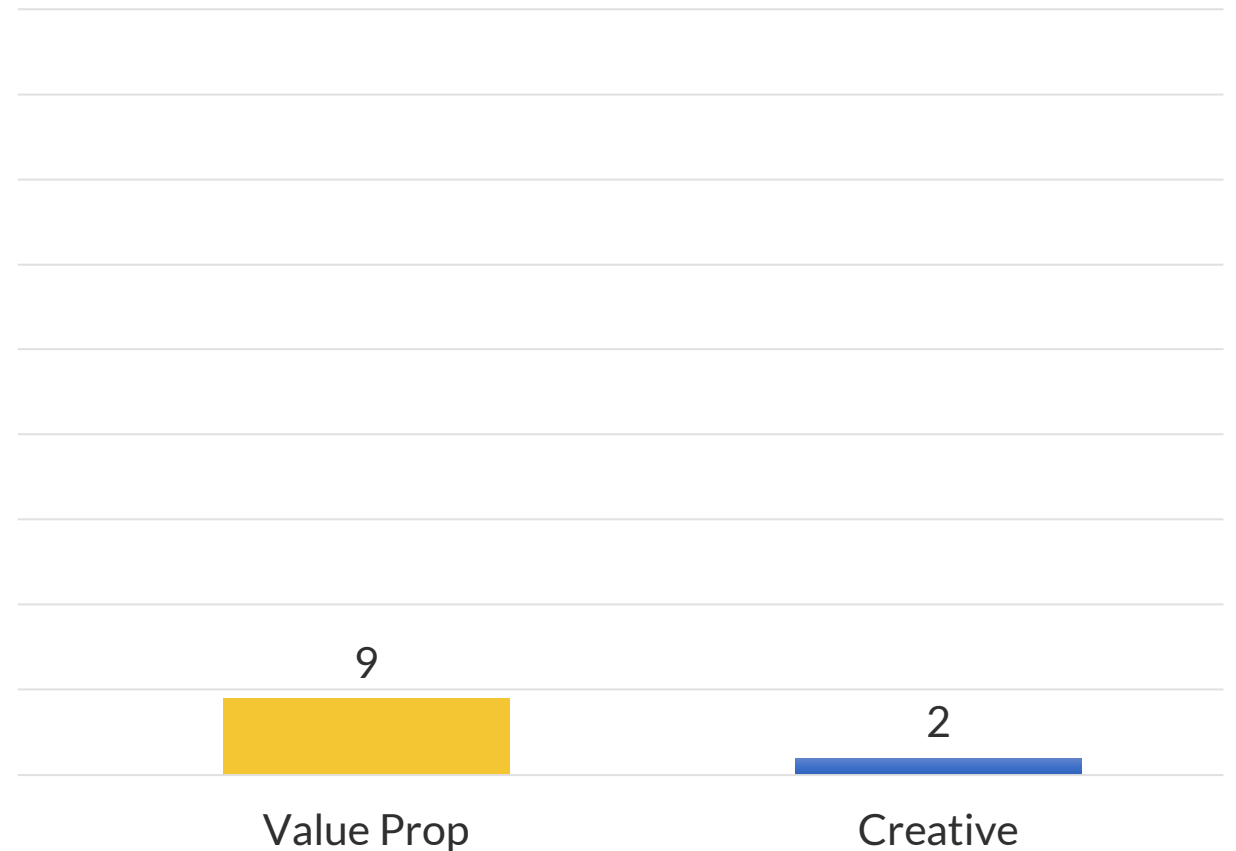
Over 1.75 million people support the ACLU.

Contributions to the American Civil Liberties Union are not tax deductible.  
\* indicates required field

**DONATION**

Type \* ☒ One-time ☐ Monthly  
*A monthly gift does even more to protect civil liberties* ↗

Select Gift Amount \* ☐ \$35 ☐ \$50 ☐ \$75 ☐ \$100 ☐ Other \$



# Style of Recurring Gift Text

**ACLU**

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## Become a Freedom Fighter — Join the ACLU

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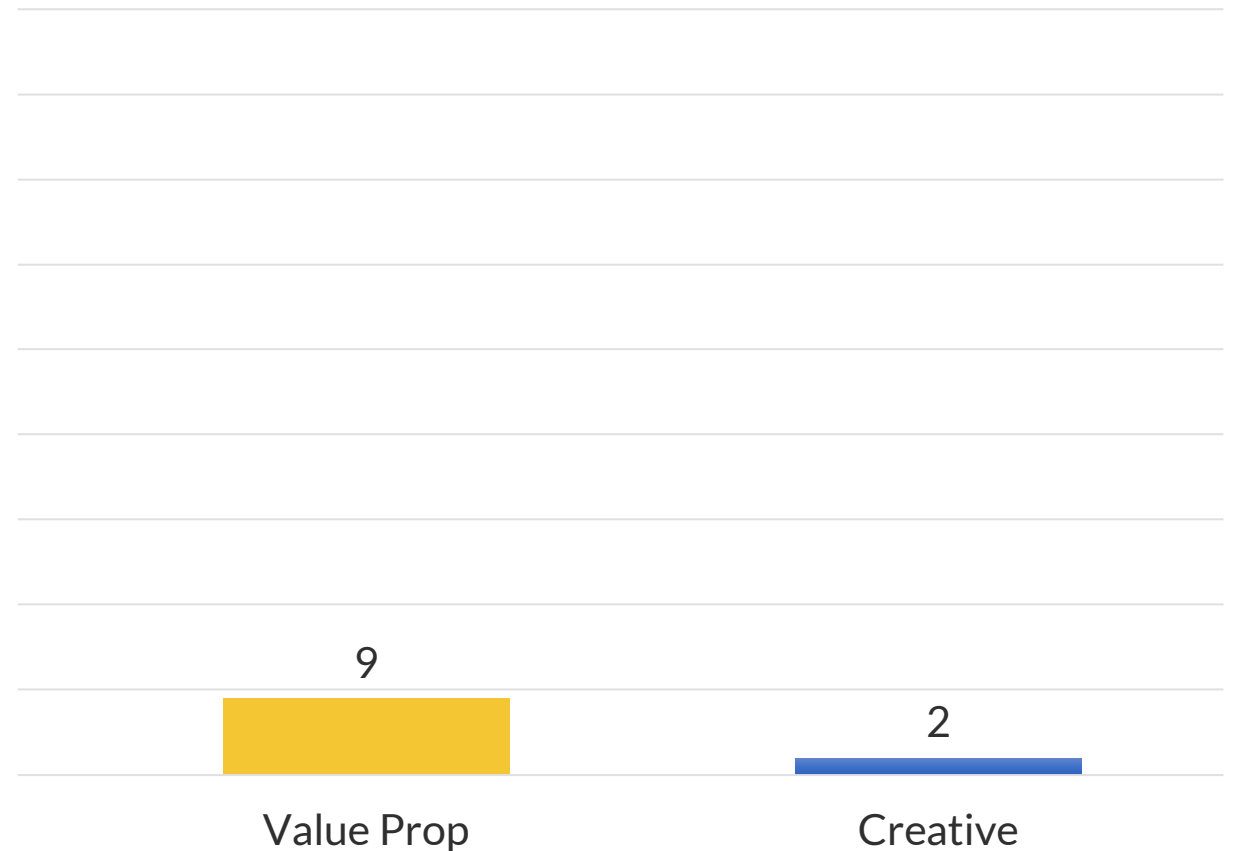
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Contributions to the American Civil Liberties Union are not tax deductible.  
\* indicates required field

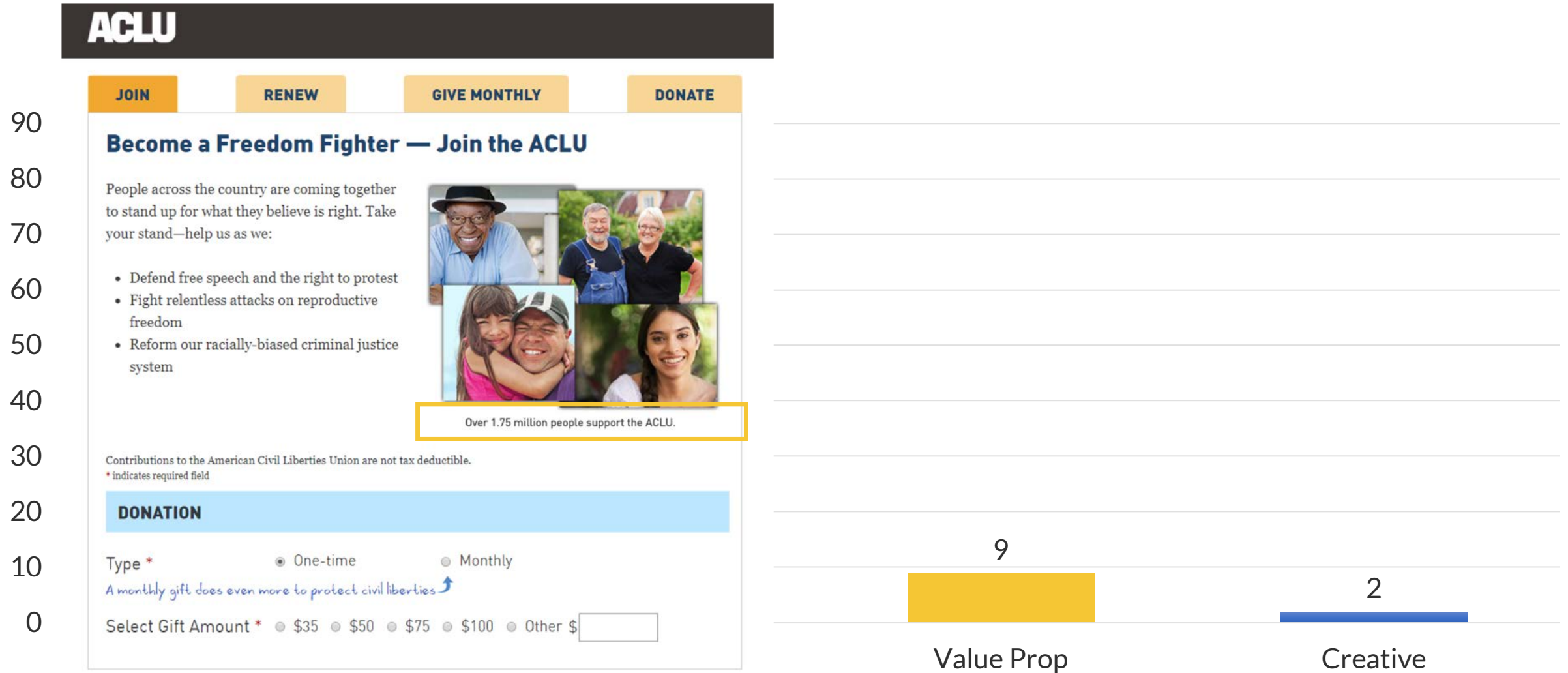
**DONATION**

Type \* ☒ One-time ☐ Monthly  
*A monthly gift does even more to protect civil liberties* ↗

Select Gift Amount \* ☐ \$35 ☐ \$50 ☐ \$75 ☐ \$100 ☐ Other \$



# Style of Recurring Gift Text





# Style of Recurring Gift Text

**ACLU**

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Over 1.75 million people support the ACLU.

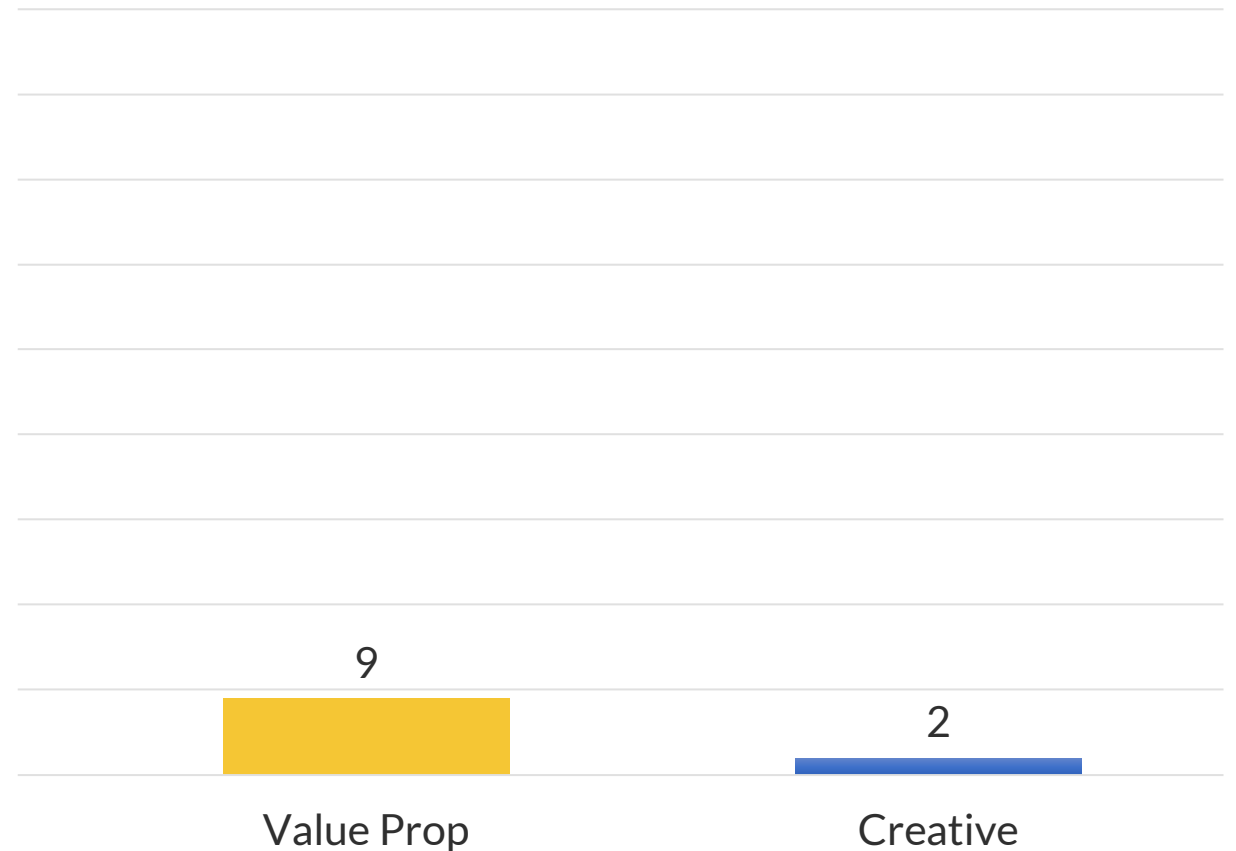
Contributions to the American Civil Liberties Union are not tax deductible.  
\* indicates required field

**DONATION**

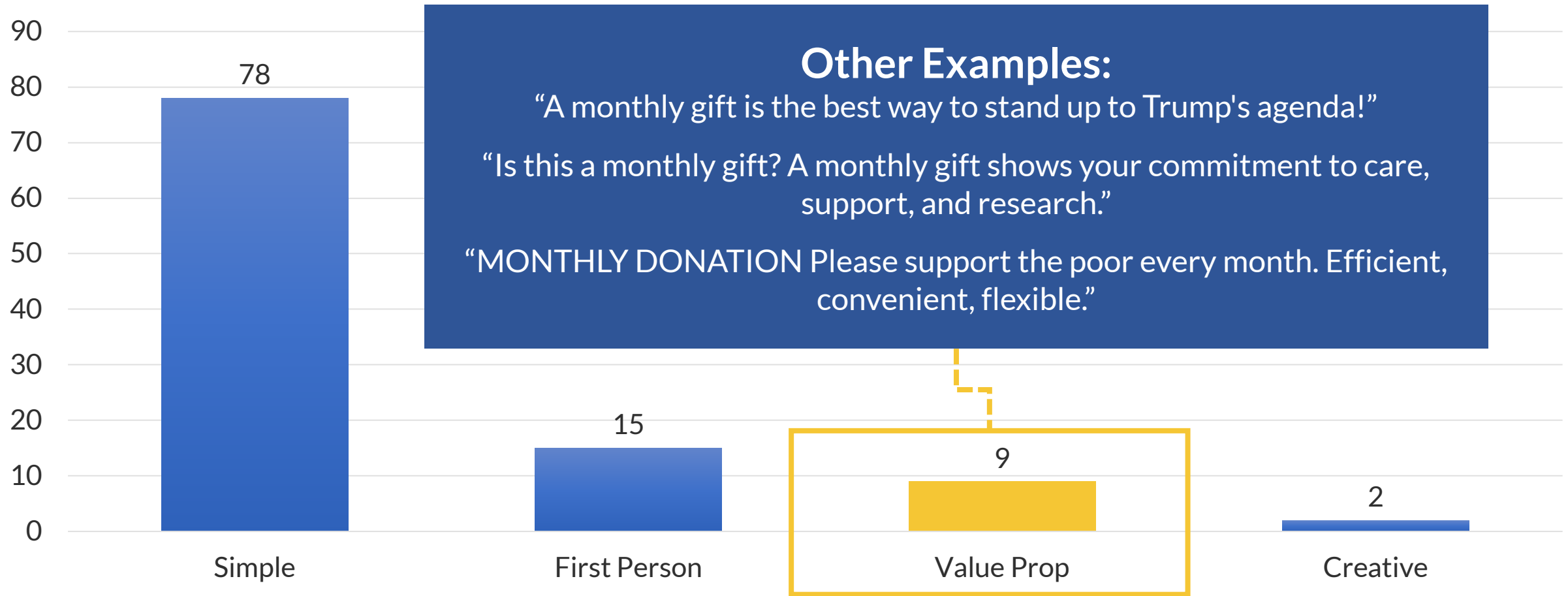
Type \* ☒ One-time ☐ Monthly

A monthly gift does even more to protect civil liberties ↗

Select Gift Amount \* ☐ \$35 ☐ \$50 ☐ \$75 ☐ \$100 ☐ Other \$



# Style of Recurring Gift Text



# How The Addition Of Value Proposition Impacts Donor Conversion

Experiment ID: #6623

## CONTROL

OUR STORY / YOUR STORY / POLICY CENTER / TAKE ACTION

ILLINOIS' COMEBACK STORY STARTS HERE

Together, we're writing the next chapter of Illinois' comeback story.

Select Donation Amount

\$35

\$50

\$100

\$250

Other Amount

Donor Information

Cardholders Name

Address

Address 2

City

Illinois

Zip

Email

Phone

Payment Information

Visa, Mastercard or American Express Number

Month

Year

Security Code

GIVE NOW

The Illinois Policy Institute is a 501(c)(3) charitable organization, and contributions are tax-deductible to the fullest extent allowed by law.

If you would like to donate by mail, please send checks to:  
Illinois Policy Institute  
300 S. LaSalle St.  
Suite 600  
Chicago, IL 60601

Illinois Policy Institute does not accept government funding.

## TREATMENT

OUR STORY / YOUR STORY / POLICY CENTER / TAKE ACTION

ILLINOIS' COMEBACK STORY STARTS HERE

Getting the unbiased truth

Illinoisans already have the highest overall state and local tax burden in the country, and the state is experiencing the largest exodus of residents it has ever seen. Lawmakers in Springfield are telling their constituents - people like you - that the only way to fix these problems is through more taxes. That is simply not true.

At the Illinois Policy Institute, we believe in the old adage that knowledge is power. To spur change, to get Illinois back on a more prosperous path, we need to make sure that families in Illinois receive accurate and actionable information.

**That is why we created IllinoisPolicy.org.**

This website is an unbiased source of what is happening across the state. We are putting out the truth that lawmakers don't want people to have. We are finding the stories the legacy media aren't reporting. And we are doing all of this for people like you.

But we must rely on the people we serve. We depend on the support of individuals like you.

**You can keep Illinois Policy as your source of unbiased news by making a gift today.**

The Illinois Policy Institute is a 501(c)(3) charitable organization, and contributions are tax-deductible to the fullest extent allowed by law.

If you would like to donate by mail, please send checks to:  
Illinois Policy Institute  
300 S. LaSalle St.  
Suite 600  
Chicago, IL 60601

Illinois Policy Institute does not accept government funding.

Select Donation Amount

\$35

\$50

\$100

\$250

Other Amount

Donor Information

Cardholders Name

Address

Address 2

City

Illinois

Zip

Email

Phone

Payment Information

Visa, Mastercard or American Express Number


Month


Year

Security Code

GIVE NOW

150.2%  
In Conversion Rate

  
salesforce.org



**TRY ADDING (MORE) VALUE  
PROPOSITION COPY (AND  
DIFFERENT TYPES) FOR RECURRING  
GIVING ON YOUR DONATION PAGE.**

**WHAT ARE OTHER WAYS YOU  
CAN COMMUNICATE VALUE?**





## WHEN YOU CREATE AN OPPORTUNITY, YOU CAN CHANGE A FAMILY'S LIFE FOREVER.

Our clients are women and men with ambitious dreams for their futures who simply need an opportunity to thrive. We provide these entrepreneurs with access to financial tools, training, and support that they need to grow their businesses and provide for their families. These resources are the key to helping them work their way out of poverty—forever.

I want to donate **\$360** to empower **1** mother to provide for her family.

CONTINUE

## THE IMPACT YOU WILL MAKE AROUND THE WORLD

### ENABLING SAFETY AND STABILITY

Millions around the world yearn to protect their children from violence and poverty. But to ensure the kids living in Colombia, ongoing civil wars threaten their families' safety and put their children at risk. Kids dream of building a home in a safer neighborhood and sending their children to college, but right now the struggles just to pay for rent. But with access to loans, training, and support from Opportunity, mothers like Ruby can earn enough money monthly for their families — whether that means putting healthy food on the table, a safe and warm bed for their kids, or a better school for them. They support their dreams — and countless others — possible.



### REACHING THOSE WHO NEED US MOST

Cardinal is the primary provider for her four grandchildren and recently lost everything when a fire swept the local market in Uganda where she sells fruits and vegetables. She is fighting to rebuild her business so she can afford to keep her grandchildren in school — and needs our help and training to do so. We want to reach more families all the time of the world. **Learn more.** Please help us reach more families. When you give to Opportunity, you help us bring life-changing programs to those mothers so we can help them rebuild their lives from the ground up.



### IMPROVING HEALTH AND WELLNESS

Sadika lives in India in an area marked by desperate poverty. Without access to maternal health, healthy sanitation, and clean water, Sadika struggles to protect her children from a host of diseases that put them at risk. And Sadika is not alone — many families suffer from preventable and treatable diseases, making it difficult for their children to learn and thrive. In response to these challenges, we are starting more of our efforts to become Community Health Leaders. These women teach their neighbors about disease prevention, health treatments, nutrition, and proper sanitation. They support and help train more of their women and are team with new technologies so they can diagnose diseases and make doctor referrals even faster.



THOUSANDS OF MOTHERS ARE READY TO WORK THEIR WAY OUT OF POVERTY. YOU CAN HELP THEM REALIZE THEIR DREAMS STARTING NOW.

### FOLLOW US ON SOCIAL MEDIA

Facebook Twitter YouTube

### SUBSCRIBE TO OUR NEWSLETTER

Sign up to receive email updates from Opportunity International.

First Name Last Name Email Address

### WHERE YOUR DONATION GOES

Opportunity International is a 501(c)(3) organization. In cases where donations are used for a specific project, we ensure that the money goes directly to the project. We also ensure that the money is used for the most effective and sustainable programs for those living in poverty. All donations are tax-deductible in the United States and the U.S. and U.S. citizens can deduct up to \$250 per year.



## WHEN YOU CREATE AN OPPORTUNITY, YOU CAN CHANGE A FAMILY'S LIFE FOREVER.

Our clients are women and men with ambitious dreams for their futures who simply need an opportunity to thrive. We provide these entrepreneurs with access to financial tools, training, and support that they need to grow their businesses and provide for their families. These resources are the key to helping them work their way out of poverty—forever.



[Click to edit](#)

I want to donate **\$360** to  
empower  
**1 mother** to provide for her  
family.



CONTINUE

[Have a Question? Send us ...](#)

## THE IMPACT YOU WILL MAKE AROUND THE WORLD



# TO THE SCIENCE!



## THE SCIENCE OF GIVING

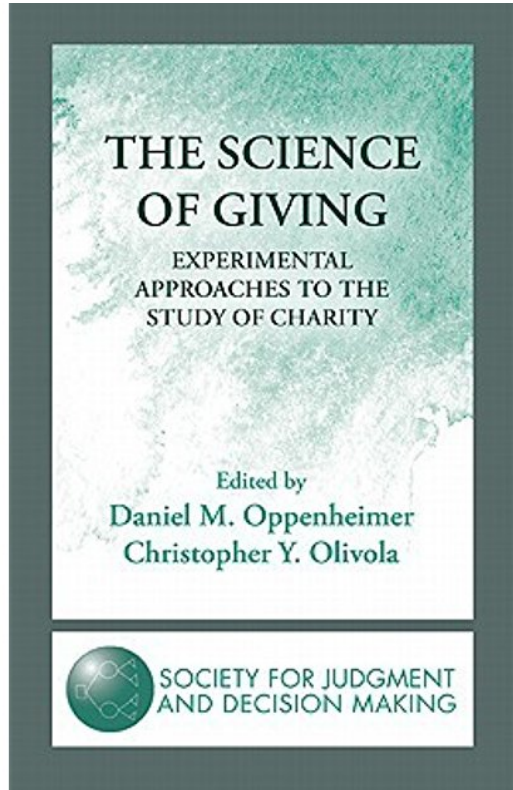
EXPERIMENTAL  
APPROACHES TO THE  
STUDY OF CHARITY

Edited by  
Daniel M. Oppenheimer  
Christopher Y. Olivola



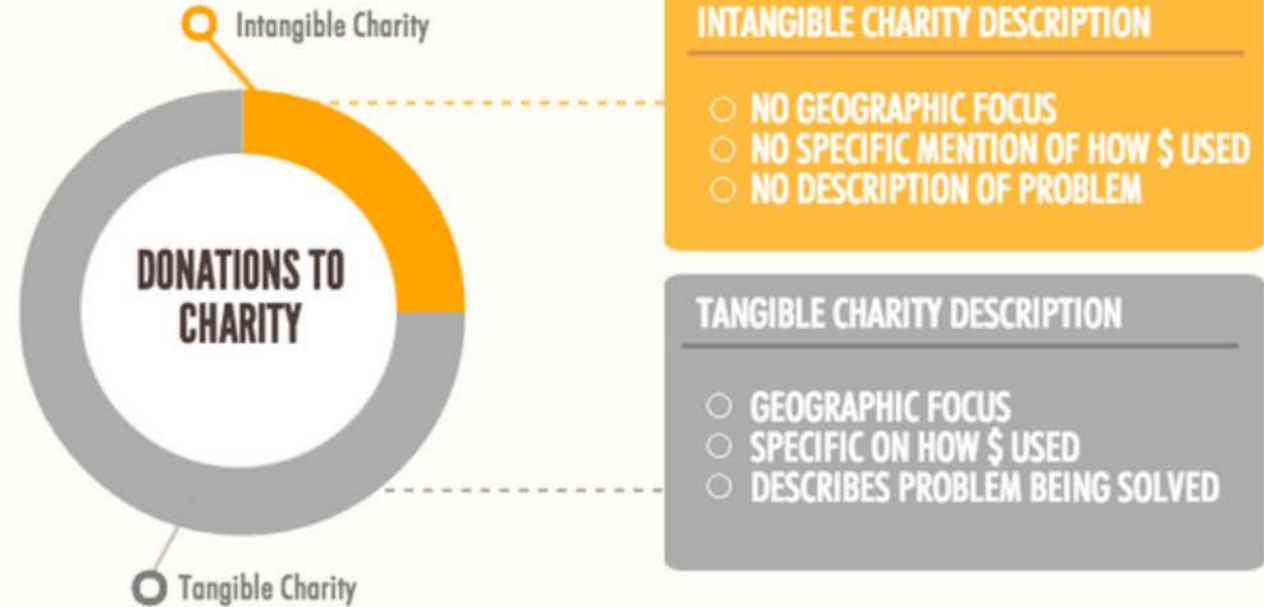
SOCIETY FOR JUDGMENT  
AND DECISION MAKING

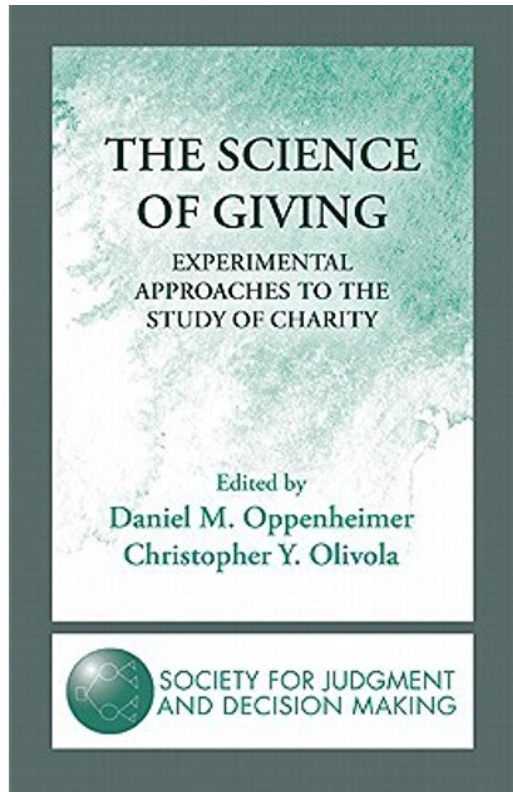




## REAL WORLD EXPERIMENT WITH TANGIBLE/INTANGIBLE CHARITIES

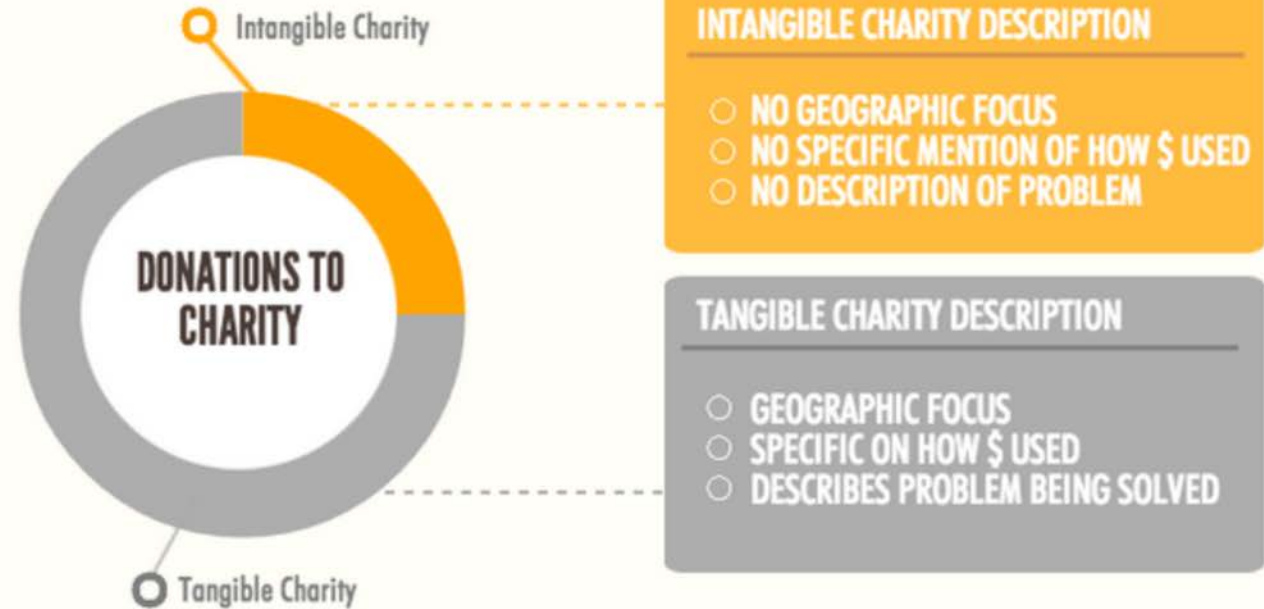
In a 2010 study, one group of potential donors read about an organization that was inherently tangible and the other read about an organization that was inherently intangible. The responses to each organization was measured.





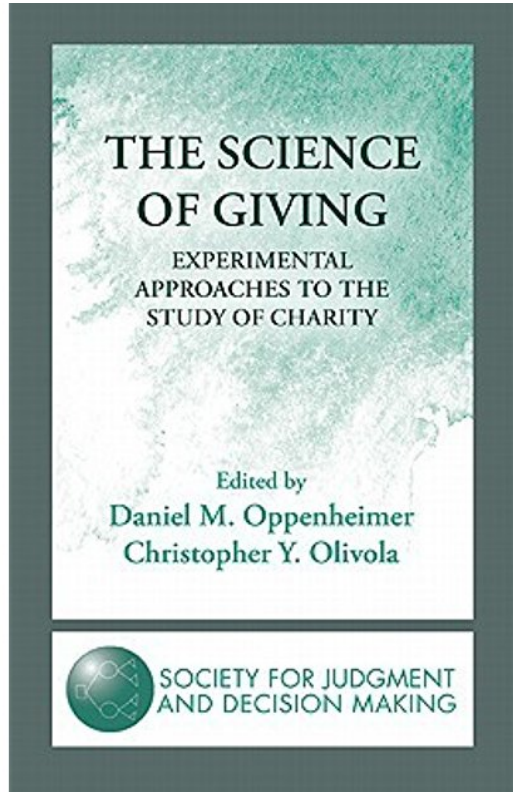
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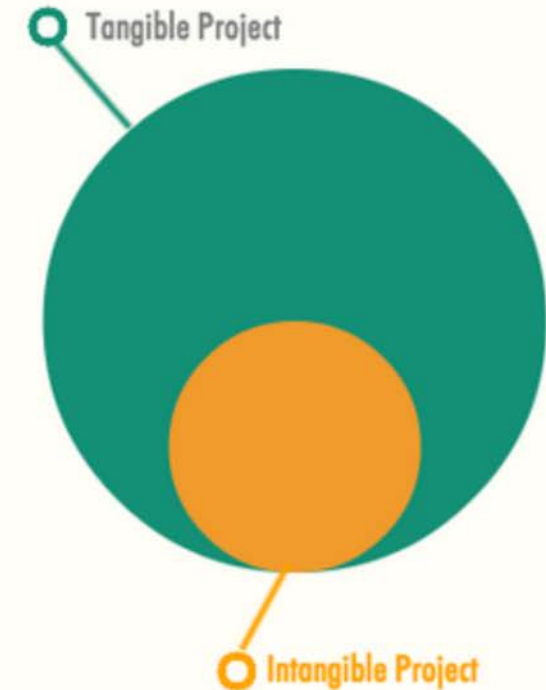
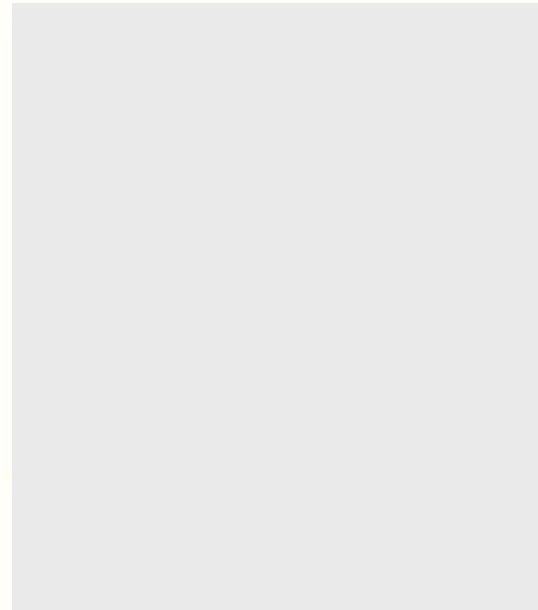
**DONORS GAVE ALMOST THREE TIMES MORE TO THE TANGIBLE CHARITY**

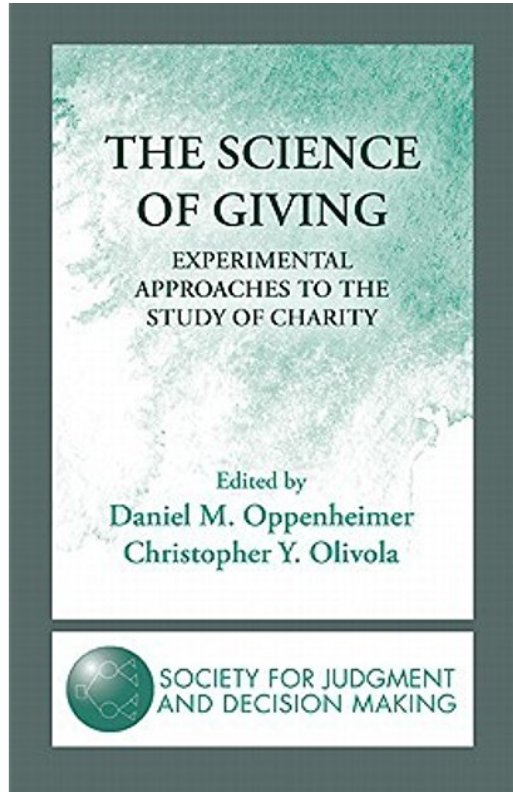




## REAL WORLD EXPERIMENT WITH TANGIBLE/INTANGIBLE PROJECTS

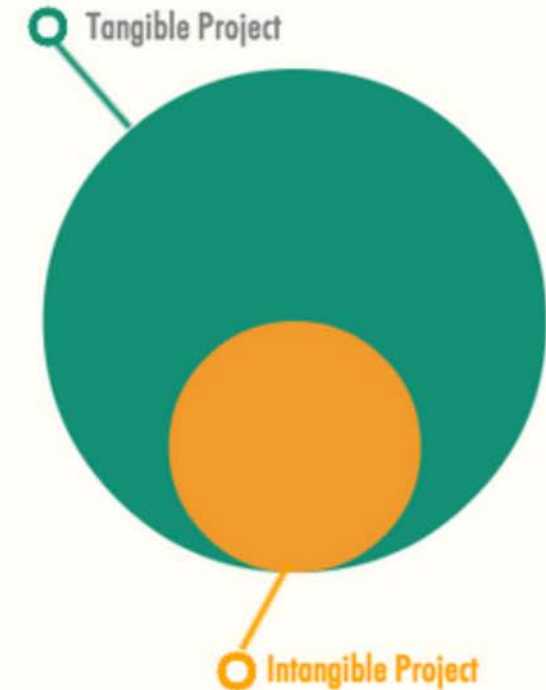
In this study, the charity remained the same (Oxfam) but the focus of the appeal to donors was different. One appeal was framed with very specific information on how the donation would be used and where while the other was more broad and general in its description.





## REAL WORLD EXPERIMENT WITH TANGIBLE/INTANGIBLE PROJECTS

In this study, the charity remained the same (Oxfam) but the focus of the appeal to donors was different. One appeal was framed with very specific information on how the donation would be used and where while the other was more broad and general in its description.

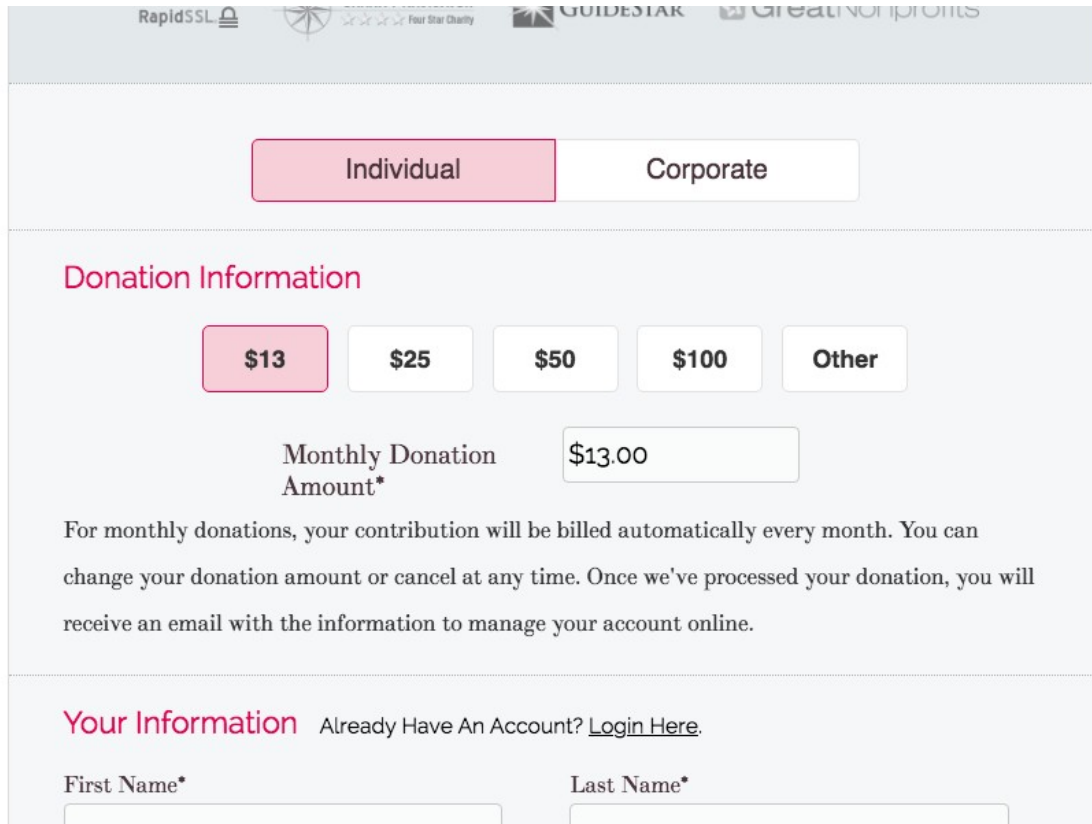


CLARITY > PERSUASION.

# How An Open Gift Field For A Recurring Donation Impacts Conversion.

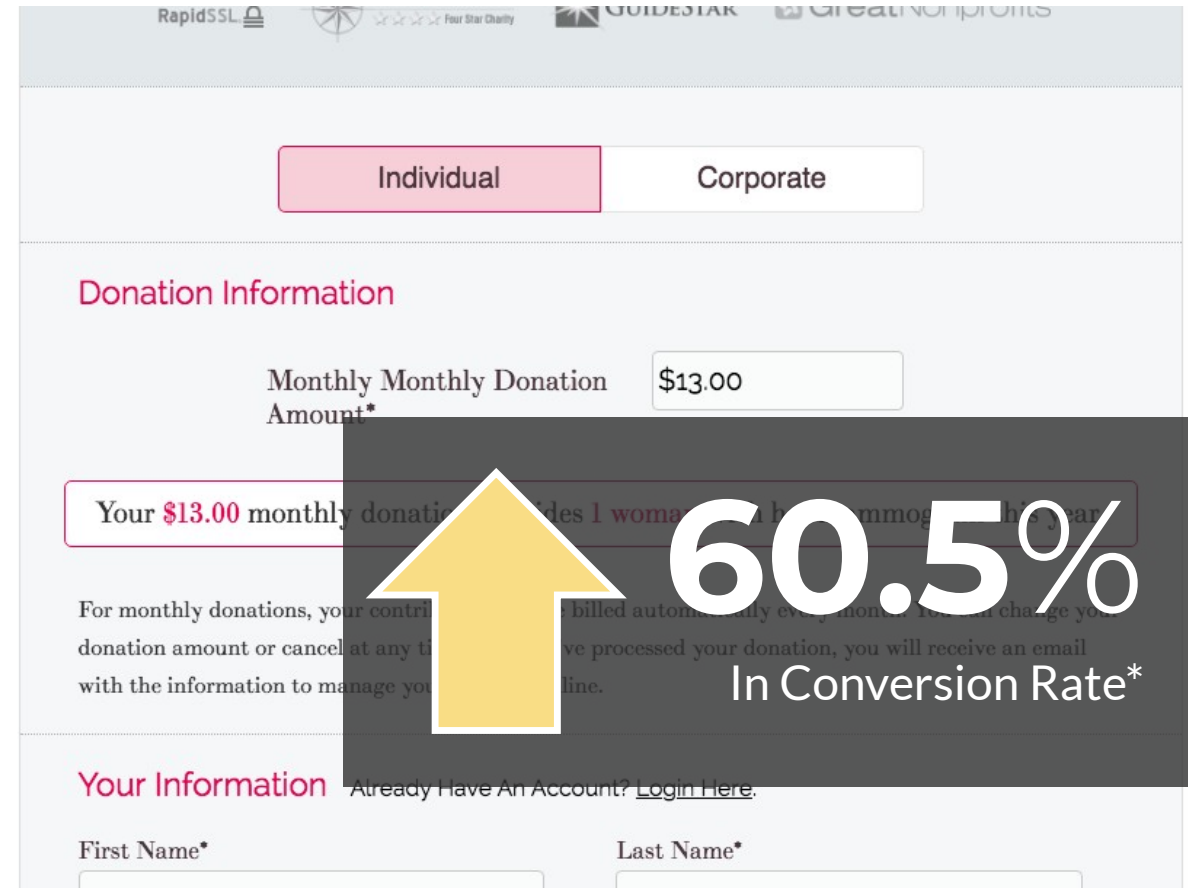
Experiment ID: #9145

## CONTROL



The Control form shows a donation page with a header containing logos for RapidSSL, Four Star Charity, GUIDESTAR, and GreatNonprofits. Below the header, there are two buttons: "Individual" (highlighted in pink) and "Corporate". Underneath, the "Donation Information" section features five buttons for donation amounts: "\$13" (highlighted in pink), "\$25", "\$50", "\$100", and "Other". Below these buttons, there is a label "Monthly Donation Amount\*" and a text input field containing "\$13.00". A paragraph of text explains that for monthly donations, the contribution will be billed automatically every month and can be changed or canceled at any time. At the bottom, the "Your Information" section includes a link "Already Have An Account? Login Here." and two input fields for "First Name\*" and "Last Name\*".

## TREATMENT



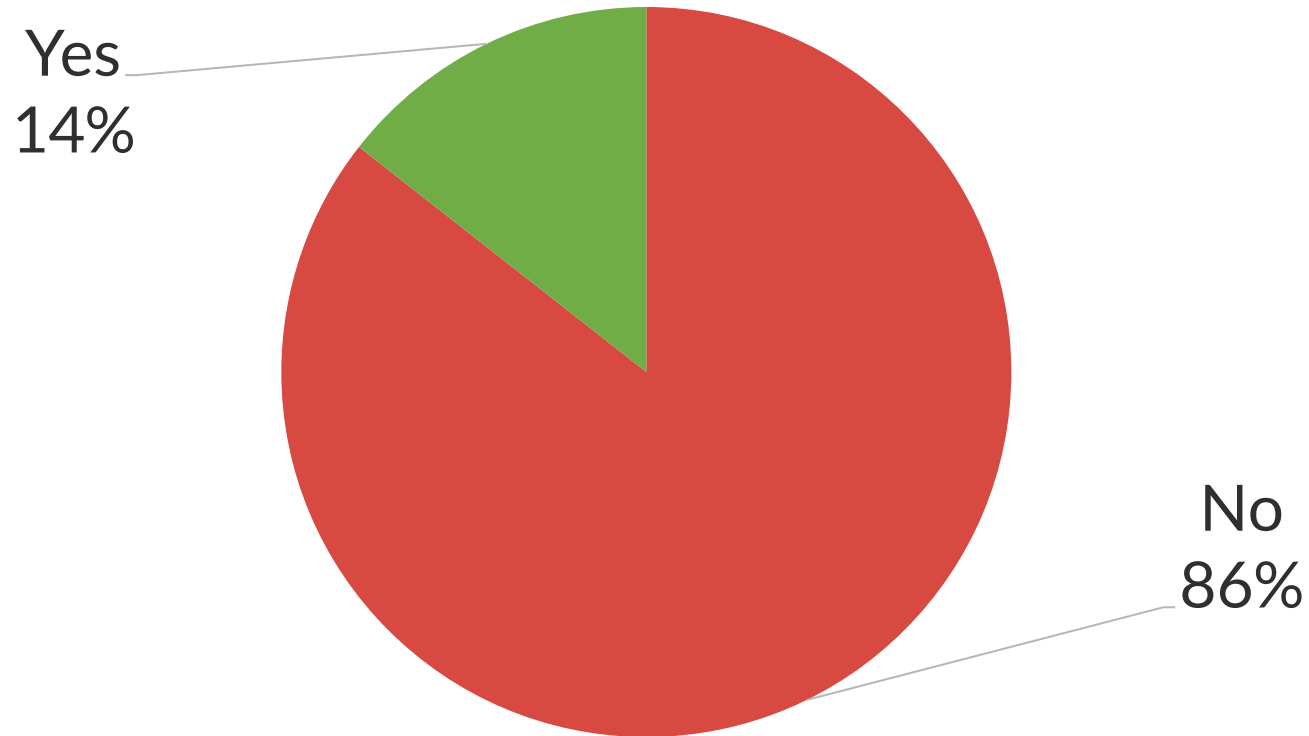
The Treatment form is identical to the Control form, showing the same header, buttons, and text. However, it includes a large yellow arrow pointing upwards towards the "\$13.00" input field. A dark grey overlay box in the center-right of the form displays the text "60.5% In Conversion Rate\*" in large white font. The text "Your \$13.00 monthly donation" is partially visible behind the overlay.

\*Not statistically valid, directional lift approaching validity.

**TRY ADDING GIFT/IMPACT  
HANDLES FOR RECURRING GIFTS.**



# Did the Organization Prompt Donors to Upgrade to a Monthly Gift?



# Prompts/Pop-Ups Ranged From Simple To Complex

## Simple Recurring Gift Callouts

### Gift Amount

Is this a monthly gift?

☐ Yes

☒ No

A monthly gift shows your commitment to care, support, and research.

\$35

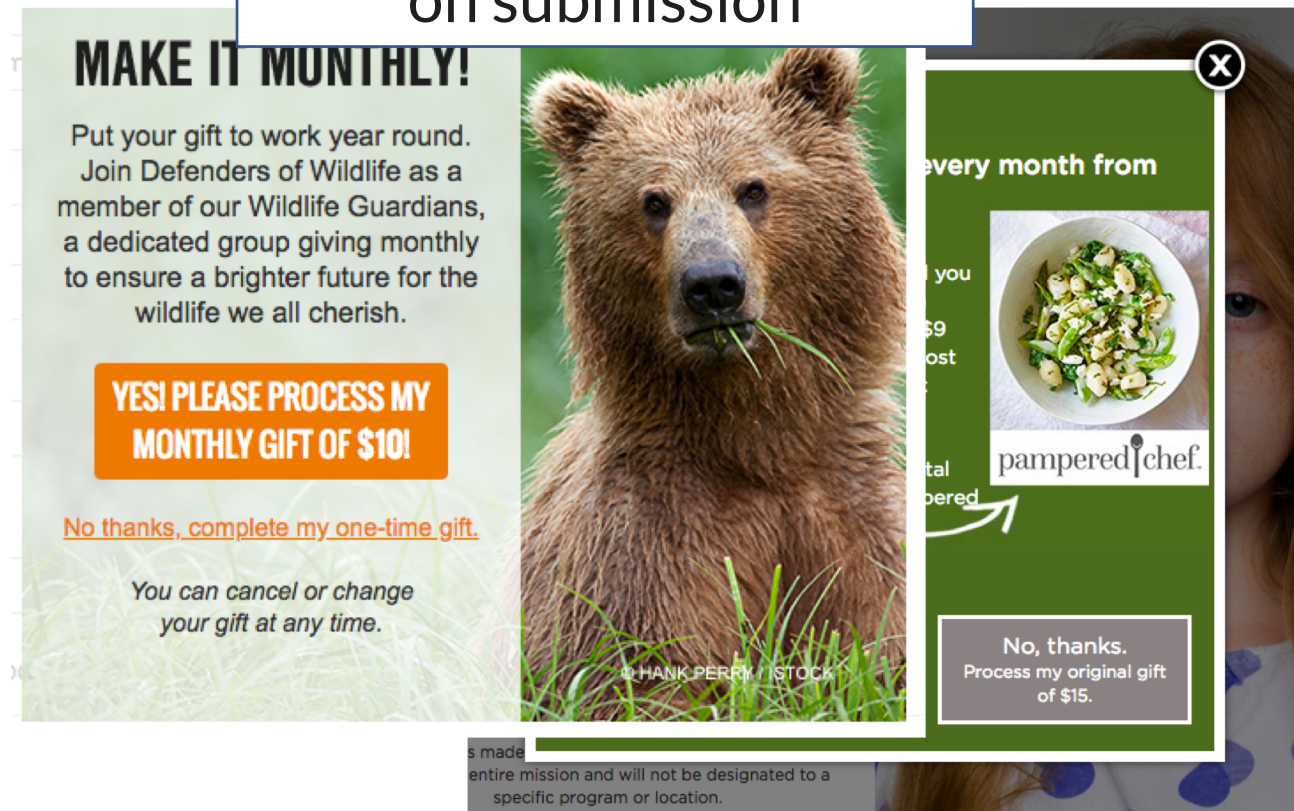
\$60

\$120

\$1,000

Your Best Gift

## Complex popups shown on submission



# How Presenting The Opportunity To Make A Recurring Gift At The Moment Of A Person's One-time Gift Transaction Affects Recurring Gift Conversion.

Experiment ID: #9024

CONTROL

TREATMENT

THE POP-UP DIDN'T SIGNIFICANTLY IMPACT THE  
LIKELIHOOD OF A PERSON GIVING A ONE-TIME GIFT.



My gift to support Family Ministry

Your gift will go to help financially struggling families through the power of the Gospel.

Using a secure, easy and secure, online method for this purpose.

If you choose to make your donation recurring, your gift becomes an ongoing gift that will be processed from your account at Focus on the Family.

When you do, you will receive exclusive benefits:

- Free Shipping - on all online Focus on the Family Store orders for as long as you're a member
- Magazines - an annual subscription to Focus on the Family magazine

For those that are already a monthly donor, thank you! For everyone else, if you choose your gift to \$15 a month, you will offer consistent help to families who need biblical truth.

Convert my gift to a \$15 monthly gift.

YES!

Convert my gift to a \$15 monthly gift.

NO, I want to make a one-time gift.

My gift will be processed from my account at Focus on the Family.

My gift will be processed from my account at Focus on the Family.

My gift will be processed from my account at Focus on the Family.

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My gift will be processed from my account at Focus on the Family.

My gift will be processed from my account at Focus on the Family.

My gift will be processed from my account at Focus on the Family.

The address provided below will be used for both billing and shipping.

First Name  Last Name

Email Address

Street Address

City  Please select region, state or province

United States  Zip/Postal Code

Telephone

PAYMENT METHOD

☐ Credit Card

☐ Electronic Funds Transfer (EFT)

☐ I'm not a robot

# How Rolling Out A Recurring Gift Pop-out On All Donation Pages Impacts Donor Conversion.

Experiment ID: #9169

CONTROL

TREATMENT

THE POP-UP DIDN'T SIGNIFICANTLY IMPACT THE  
LIKELIHOOD OF A PERSON GIVING A ONE-TIME GIFT.

24%  
In Recurring Gifts



A composite image featuring a space shuttle launch. The top half shows the Space Shuttle Columbia on the Mobile Launcher Platform being mated to the External Tank and Solid Rocket Boosters by the Shuttle Carrier Mechanism. The bottom half shows the shuttle launching with a massive plume of fire and smoke. The text "COGNITIVE MOMENTUM." is overlaid in white on a dark horizontal band across the center.

**COGNITIVE MOMENTUM.**



**TRY ADDING A PROMPT FOR A  
RECURRING GIFT BEFORE ONE-  
TIME DONATION COMPLETION.**

DONATION & LANDING

PAGE

OPTIMIZATION

Free Course

NEXTAFTER.COM/**LANDINGPAGE**

**3. IT WASN'T EASY TO  
ACTUALLY SET UP THE  
RECURRING GIFT.**

We were  
blacklisted by  
multiple  
organizations for  
being too  
generous.

The client IP 67.198.59.227 has been blacklisted due to repeated authorization failures.

### Donation

\$100

\$250

\$500

\$1,000

\$25.00

### Gift Preferences

Agency Location

Where needed most

### Tribute Gift

Title:  
Select a Salutation ▼

First Name: \*  
Kevin

Middle Name:

Last Name: \*  
Peters

Spouse Title:  
Select a Salutation ▼

Spouse First Name:

Spouse Middle Name:

Spouse Last Name:

Phone Number: Phone Type:  
 ☒ Home ☐ Business ☐ Cell

### Billing Address

Address Type: \*  
☒ Home ☐ Business

Country: \*  
United States ▼

We were asked  
for highly  
personal  
information.



We had to answer questions that were confusing, to say the least. (And many times were required).

Each gift supports the needs, goals and dreams of people with intellectual disabilities. Together, we can make a life of possibilities a reality.

We've run into a slight problem. Correct the following to continue:

- Please select a value for field: Agency Location

**Donation**

\$100 \$250 \$500 \$1,000 **\$15.00**

**Gift Preferences**

Agency Location <Please Select>

Please select a value for field: Agency Location

**Tribute Gift**

☐ This gift is in honor, memory, or support of someone

Leave a comment (optional):

optional

**Billing Address**

## ADDITIONAL INFORMATION

Type of gift

Recurring gift

Anonymous

☐ I prefer to make this donation anonymously

I decline benefits

Yes ▾

???

## BILLING INFORMATION

Title

-please select- ▾


First Name \*

And we had to make commitments we didn't fully understand.

However, the worst part was the number of times we had to prove that we were human.

To help confirm you are a human and not a robot, please check the box below

☐ I'm not a robot

  
reCAPTCHA  
[Privacy](#) - [Terms](#)

Which inevitably led to a fun game of “pick the street signs”

To help confirm you are a human and not a robot, please check

☐

I'm not a robot




reCAPTCHA  
Privacy - Terms

Select all squares with street signs.



VERIFY



A comedian in a dark suit and tie stands on a stage, holding a microphone. The background features a large, stylized sunburst or fan-like structure with radiating lines and warm lighting. The stage floor is dark, and there are small lights along the front edge.

“The world is run by robots and we spend most of our day telling them we’re not a robot just so we can log on and look at our own stuff.”

# NSFW (Not Safe for Webinar)



DOES THIS EVEN  
MATTER?

# From the Research Library

## CONTROL

### Your Information

\* First Name

\* Last Name

\* Country

United States

\* Street Address

Street Address 2

\* City

\* State

-Choose-

\* Zip Code

\* Email Address

☒ Yes! Keep me posted on the latest CaringBridge news and happenings

Preferred Phone

☐ Help me determine if my employer will match my gift.

### Payment Details

\* Credit Card Number

\* Verification Code

## TREATMENT

### Your Information

\* First Name

\* Last Name

\* Country

United States

\* Street Address

Street Address 2

\* City

\* State

-Choose-

\* Zip Code

\* Email Address

Preferred Phone

☒ Yes! Keep me posted on the latest CaringBridge news and happenings

### Payment Details

\* Credit Card Number

\* Verification Code

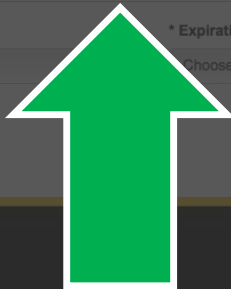
\* Expiration Month

-Choose-

\* Expiration Year

-Choose-

Donate \$70



39.4%

In Donations

# From the Research Library

## CONTROL

**Your Name**

First Name  Last Name

Email Address

Country

Street Address

Street Address 2

City  State

Zip Code

## TREATMENT

**Your Name**

First Name  Last Name

Email Address

Country

Street Address

Street Address 2

City  State

Zip Code

Cell Phone



43%

In Donations

# From the Research Library

CONTROL

TREATMENT

**DONATE ONLINE** 1 Enter Info 2 **Verify** 3 Confirmation

Please verify that your information is correct, or [click here](#) to make changes. [Process Donation](#)

**Personal Information**

First Name: Harvest  
Last Name: Test

**Contact Information**

E-mail: Test@harvest.org  
Phone Number: (951) 687-6902  
Street Address: 6115 Arlington Ave  
City: Riverside  
State: CA  
Zip Code: 92504  
Country: USA

**Donation Information**

Gift Amount: \$5.00 (USD)  
Designation: Where Most Needed  
Recurrence: None (Single Gift)  
Payment Type: Credit Card  
Thank You Gift: A Lifetime of Wisdom

**Billing Information**

Card Type: Visa  
Card Number: XXXX-XXXX-XXXX-1111  
Verification Number: 123  
Expiration Date: 01/2017

Please verify that your information is correct, or [click here](#) to make changes. [Process Donation](#)

Straight to  
Thank You  
Page



**176%**

In Donations



**TRY REMOVING CONFUSING  
AND UNNECESSARY FORM  
FIELDS AND DONATION STEPS.**



# MAKE YOUR DONATION

## DONOR INFORMATION



Already have an account? [Sign in](#) to autofill this form.

## PAYMENT METHOD

CREDIT CARD



BANK ACCOUNT



PAYPAL



## SHIPPING ADDRESS

# MAKE YOUR DONATION

## DONOR INFORMATION

// Your Email \*



Already have an account? [Sign in](#) to autofill this form.

Your Name \*

First // |

Last //

Your Partner's Name

First //

Last //

☐ Dedicate your donation.

## PAYMENT METHOD

CREDIT CARD



BANK ACCOUNT



PAYPAL





**TRY MAKING A RECURRING  
DONATION TO YOURSELF AND  
TRACK THE EXPERIENCE.**

# Here's a Tool to Help...

- Make a recurring donation to yourself
- Take the friction self assessment
  - 20 questions
  - Tips to optimize

[nextafter.com/resources/#tools](https://nextafter.com/resources/#tools)

## Friction! It's What's Killing Your Online Donations

### Friction:

/frikSHən/ Noun. Anything that causes psychological resistance to a given element in the online donation process.

Is there friction in your online giving process? Answer the following questions to the best of your knowledge to find out if friction may be slowing your donors down.

### Your Friction Self-Assessment

1. Does your giving page include links to other content pages?

2. Does it take more than 1 click to complete your donation process?

3. Does it take longer than 5 seconds for your donation page to load?

4. Do you have gift designation options on your donation page?

5. Do you provide an option to make a gift in memory of someone else?

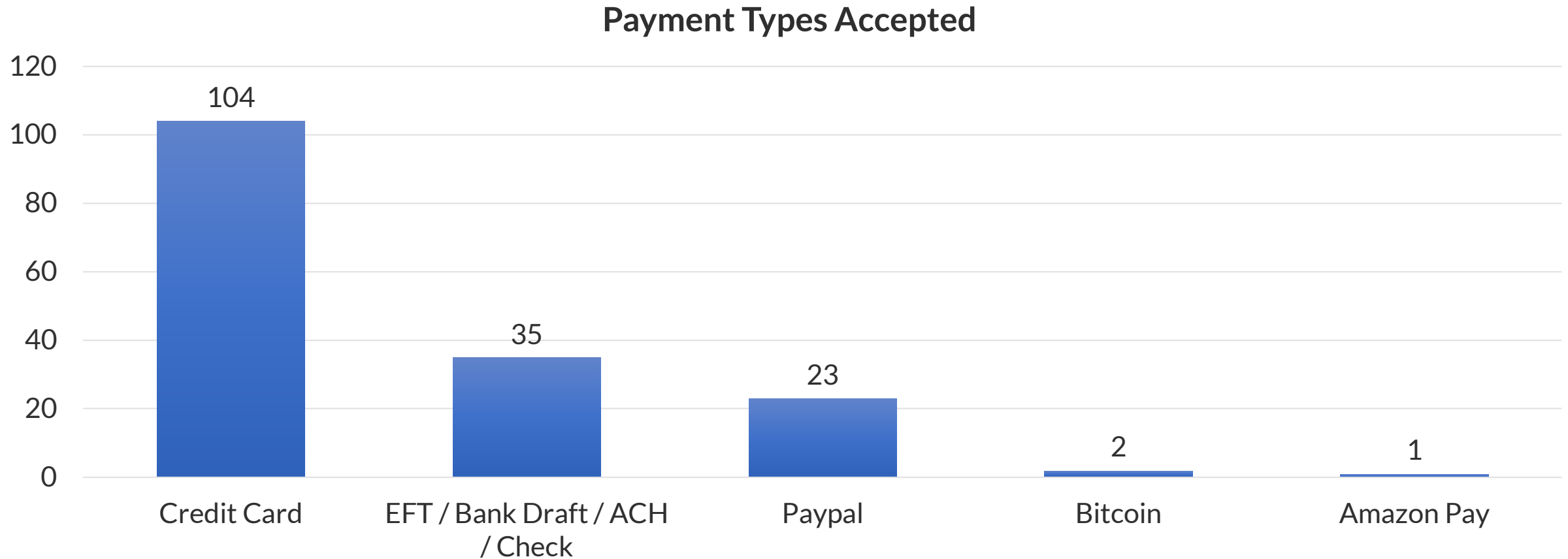
6. Does your form include any additional fields besides payment and contact information?

7. Do you have to pinch and zoom to complete your donation page on a mobile device?

8. Do you require visitors to register an account to make a donation?

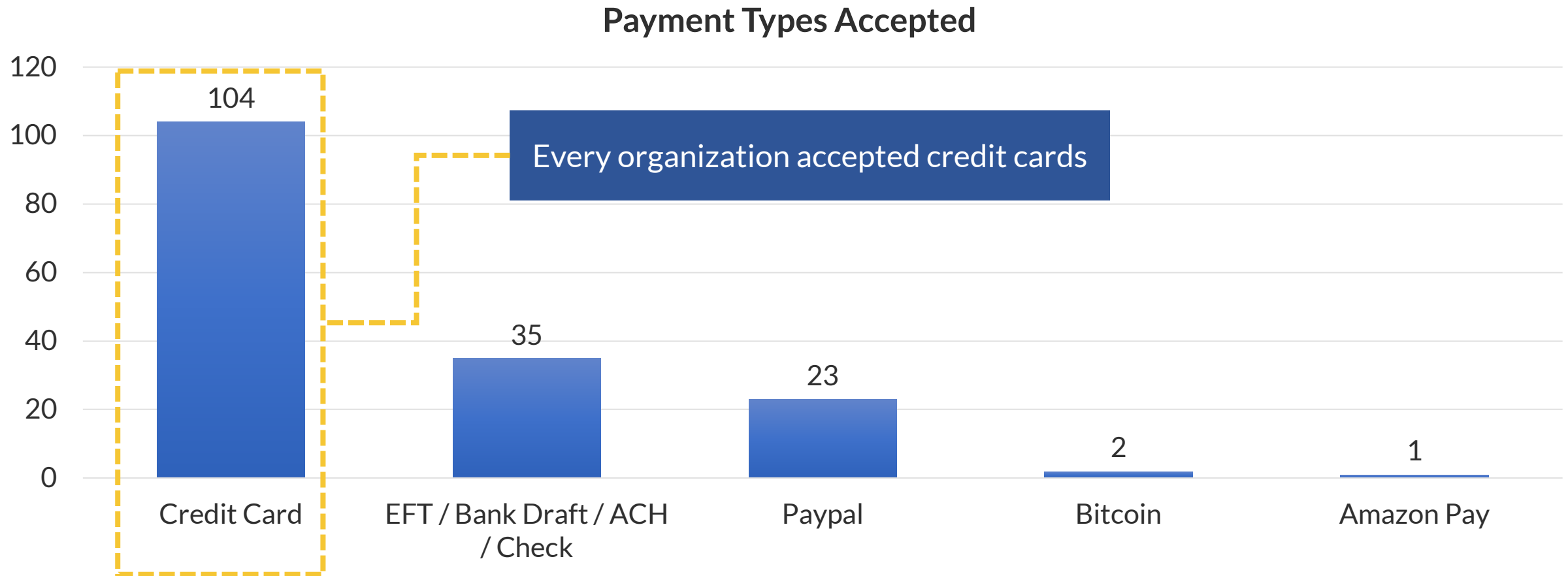
9. When a field is omitted, does your donation page highlight the missing field(s) before the gift is submitted?

# Not All Payment Types Are Equal

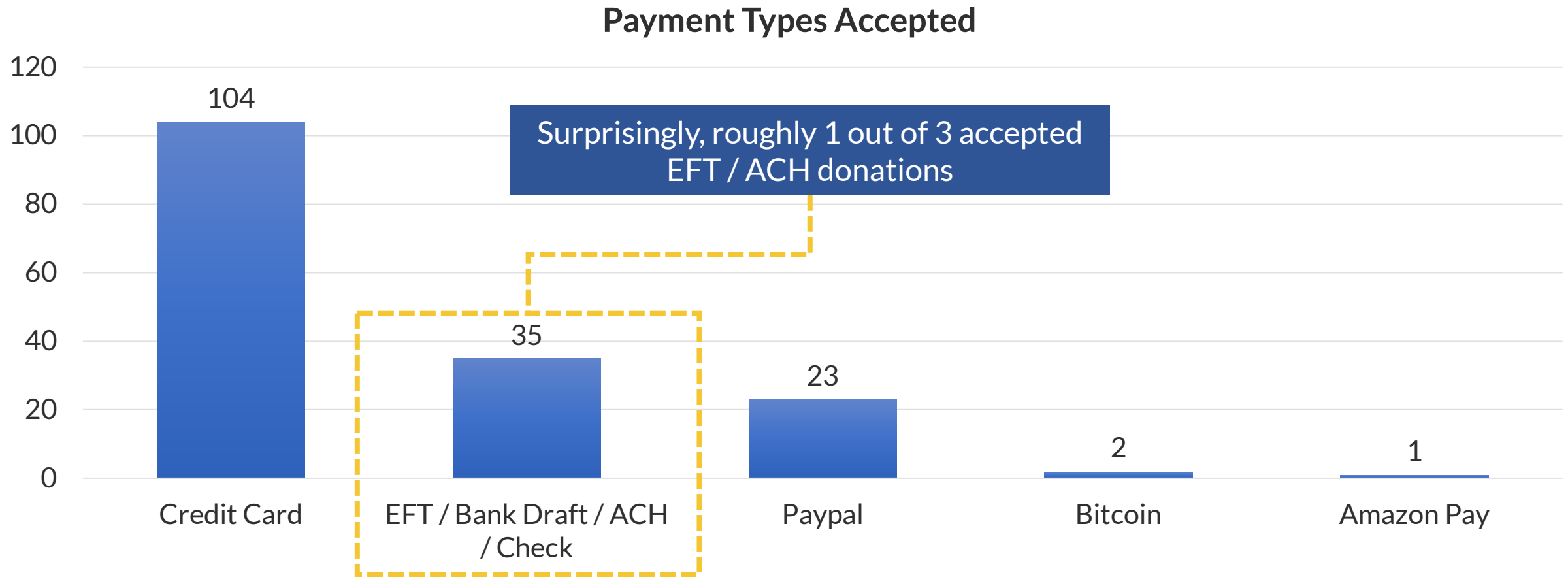




# Not All Payment Types Are Equal



# Not All Payment Types Are Equal



MEDIAN RETENTION RATE FOR  
EFT DONORS WAS 4% HIGHER  
THAN CREDIT CARD DONORS.

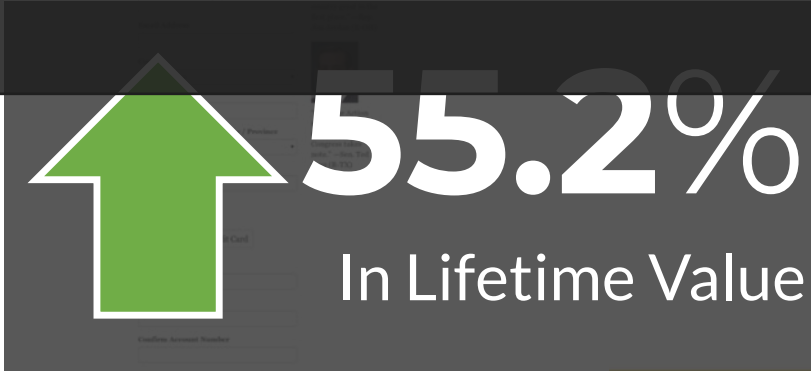
# How Additional Payment Options Impacted Long-term Revenue

Experiment ID: #5981

CONTROL

TREATMENT

NO SIGNIFICANT DIFFERENCE IN CONVERSION RATE BETWEEN THE TWO FORMS.



**TRY ADDING AN EFT/ACH  
PAYMENT OPTION.**



## Payment Information

### Payment Method:

Credit Card

Pay by Check

PayPal

### Checking Account Information:

\* Bank Routing Number: [What is this?](#)

\* Bank Account Number:

\* Verify Bank Account Number:

\* Account Type

☐ Checking

☐ Savings

\* ☐ By checking this option, I agree to use my bank account as a payment method and authorize this organization to debit my bank account to fulfill my donation commitment.

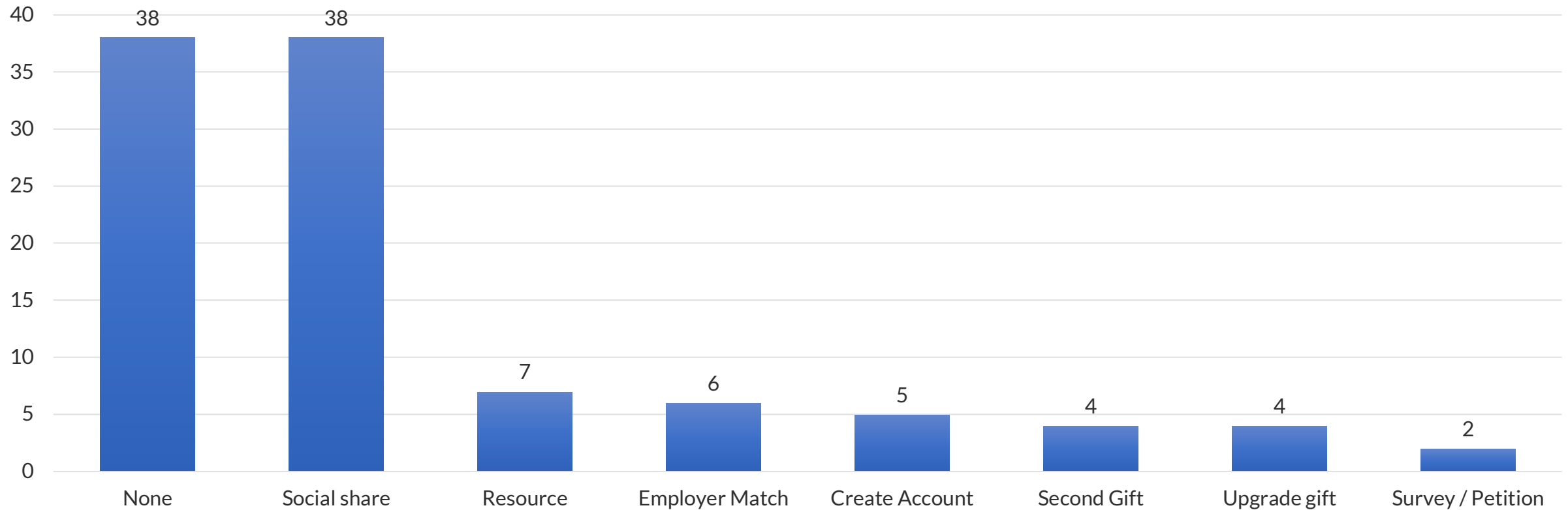
**DONATE NOW**

A person with short dark hair, wearing a blue and white striped sweater, is seen from behind. They are looking at a wall covered in numerous white sticky notes. The sticky notes contain various handwritten notes, diagrams, and sketches, including a flowchart and a small drawing of a person. The overall scene is dimly lit, with a blue tint.

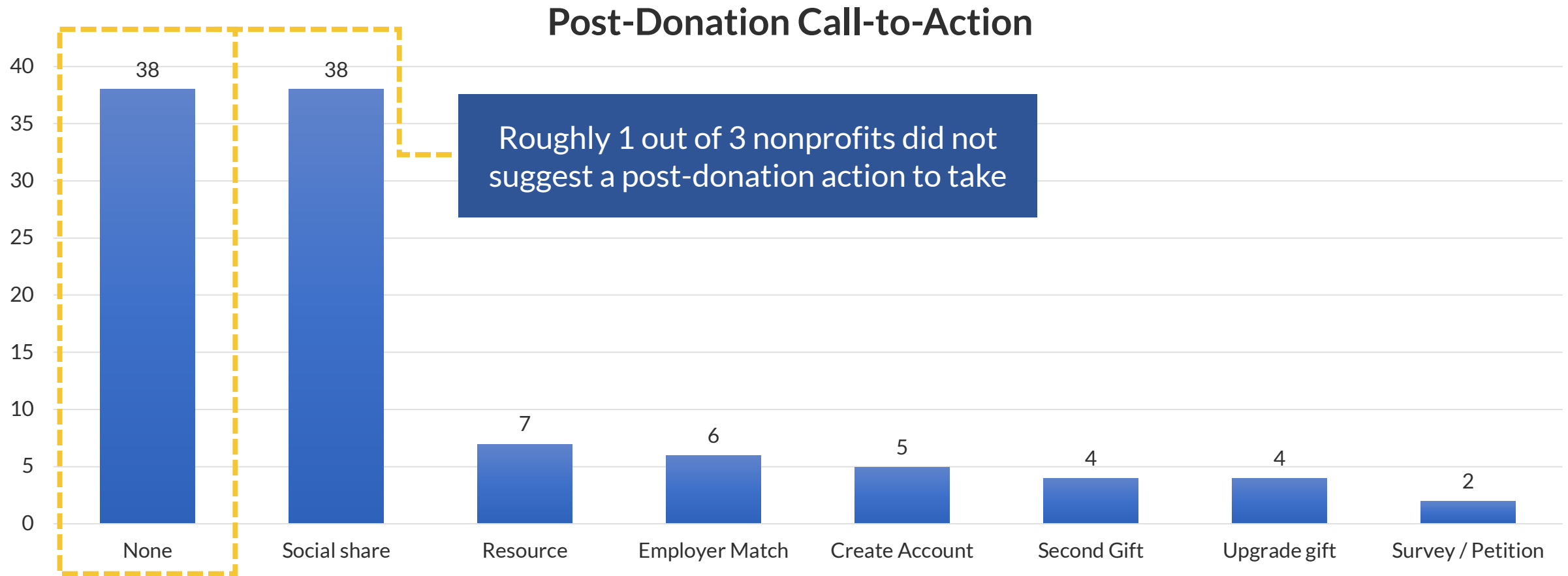
**4. THERE WASN'T MUCH TO  
DO AFTER A DONATION.**

# So We Just Donated, Now What?

Post-Donation Call-to-Action

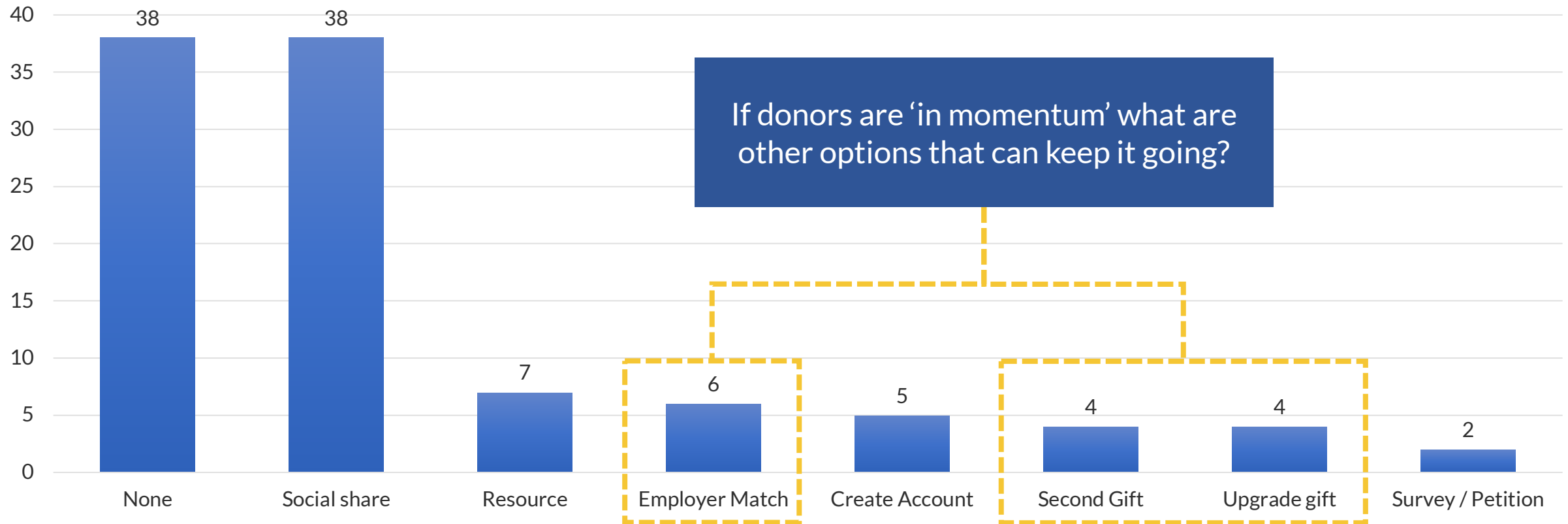


# So We Just Donated, Now What?



# So We Just Donated, Now What?

## Post-Donation Call-to-Action





Dear Paul,

Thank you for your gift of \$15.00 to the Alzheimer's Association. Your donation allows us to continue the fight against Alzheimer's disease through vital research and essential care and support programs and services.

As a friend of the Alzheimer's Association, did you know you can [double your donation](#) of \$15.00 through your [employer's matching gift program](#)? Many companies have matching gift programs that will double or even triple charitable contributions made by their employees. Workplace giving is a simple and effective way for employees to support the Alzheimer's Association mission. Learn more and [find out if your company](#) will match gifts to the Alzheimer's Association.

Now is also a great time to [become a monthly donor](#)!

You'll find [giving a monthly donation](#) is an ideal way to support the cause. You'll be able to make regular, repeated donations that fit into your budget and provide help and hope to all affected each and every month.

Benefits of becoming a [monthly donor](#):

- It's easy – your donation is charged to your credit card automatically each month and can be cancelled at any time.
- It's productive – monthly giving reduces the need for regular, costly fundraising appeals, so your money goes even further.
- Makes a sustained difference – recurring donations help ensure that much-needed services are available to those living with Alzheimer's disease and their families.

[Please consider becoming a monthly donor today.](#)

Thank you for your continued support!

Sincerely,

Alzheimer's Association

This receipt verifies your charitable contribution to the Alzheimer's Association. The Association, in return for this contribution, provided no goods or services. Please keep this as documentation for income tax purposes.

Dear Paul,

Thank you for your gift of \$15.00 to the Alzheimer's Association. Your donation allows us to continue the fight against Alzheimer's disease through vital research and essential care and support programs and services.

As a friend of the Alzheimer's Association, did you know you can [double your donation](#) of \$15.00 through your [employer's matching gift program](#)? Many companies have matching gift programs that will double or even triple charitable contributions made by their employees. Workplace giving is a simple and effective way for employees to support the Alzheimer's Association mission. Learn more and [find out if your company](#) will match gifts to the Alzheimer's Association.

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Thank you for your continued support!

Sincerely,

Alzheimer's Association

This receipt verifies your charitable contribution to the Alzheimer's Association. The Association, in return for this contribution, provided no goods or services. Please keep this as documentation for income tax purposes.

**10% TO 20% OF DONORS WILL GIVE A  
2<sup>ND</sup> GIFT IF IMMEDIATELY PROMPTED  
(AND PROCESS IS MADE EASY).**

**TRY ASKING FOR A  
RECURRING GIFT ON THE  
CONFIRMATION PAGE.**

# Some Of What We Learned About Recurring Giving

1. It's not that easy to find out where to make a recurring donation.
2. It's not clear why you should become a recurring donor.
3. It wasn't easy to actually set up the recurring gift.
4. There wasn't much to do after a donation.



# 8 Ideas to Try and Optimize Your Recurring Giving Process

1. Try having a clear donate button in your navigation.
2. Try adding a specific CTA/button for recurring gifts in your navigation.
3. Try adding more value proposition copy (and different types) for recurring giving on your donation page.
4. Try adding gift/impact handles for recurring gifts.
5. Try adding a prompt for recurring gift before one-time donation completion.
6. Try adding an EFT/ACH payment option.
7. Try making a donation to yourself and removing confusing and unnecessary form fields and donation steps.
8. Try a recurring gift conversion ask on the confirmation page.

# WHAT WE LEARNED ABOUT RECURRING GIVING COMMUNICATIONS.

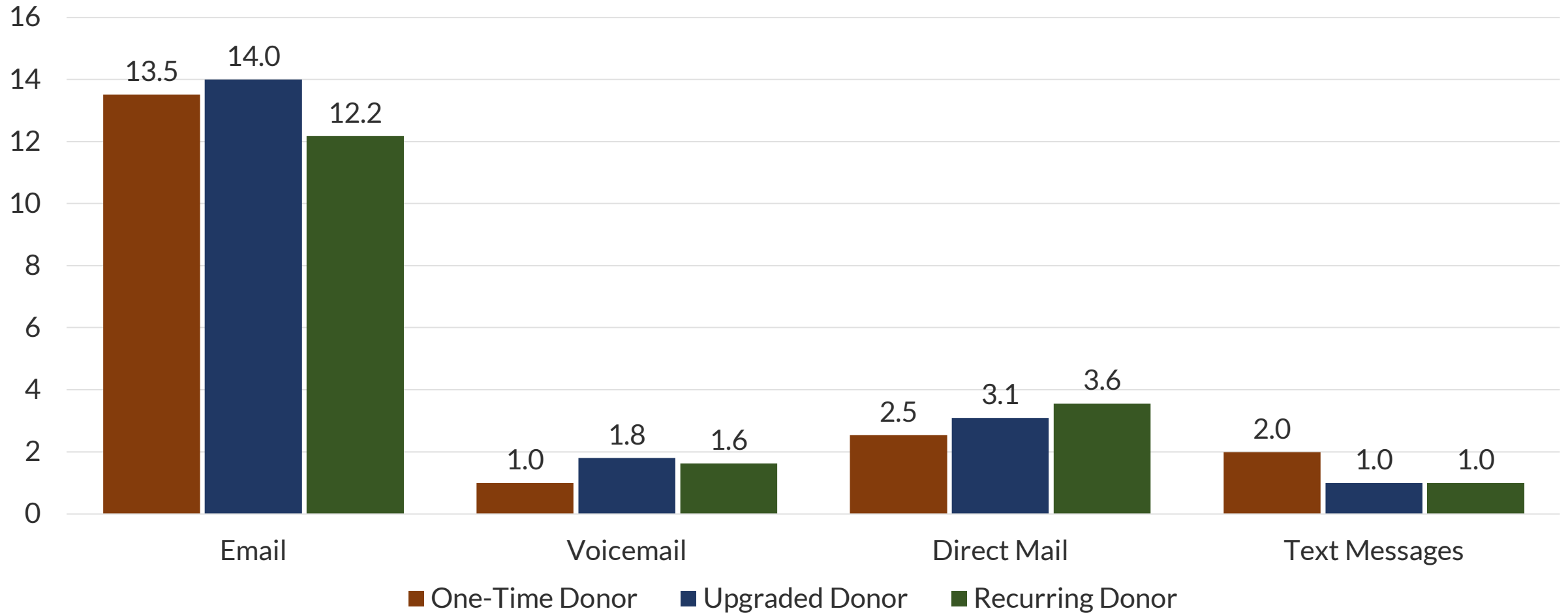
# 1. RECURRING DONORS AREN'T TREATED *THAT* DIFFERENTLY.

**38%** OF ORGANIZATIONS DID NOT  
CHANGE THEIR EMAIL STRATEGY FOR  
RECURRING DONORS.



# Channel Frequency by Donor

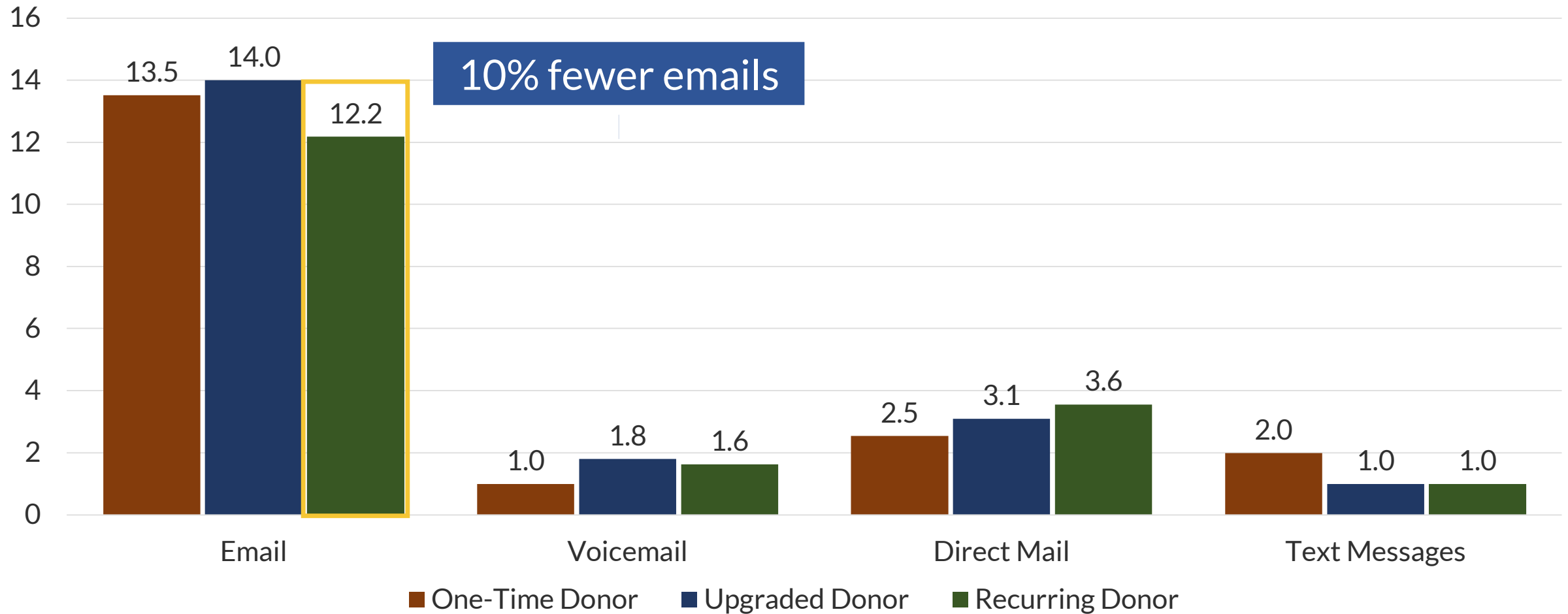
For those using each channel, how much did they send on average?





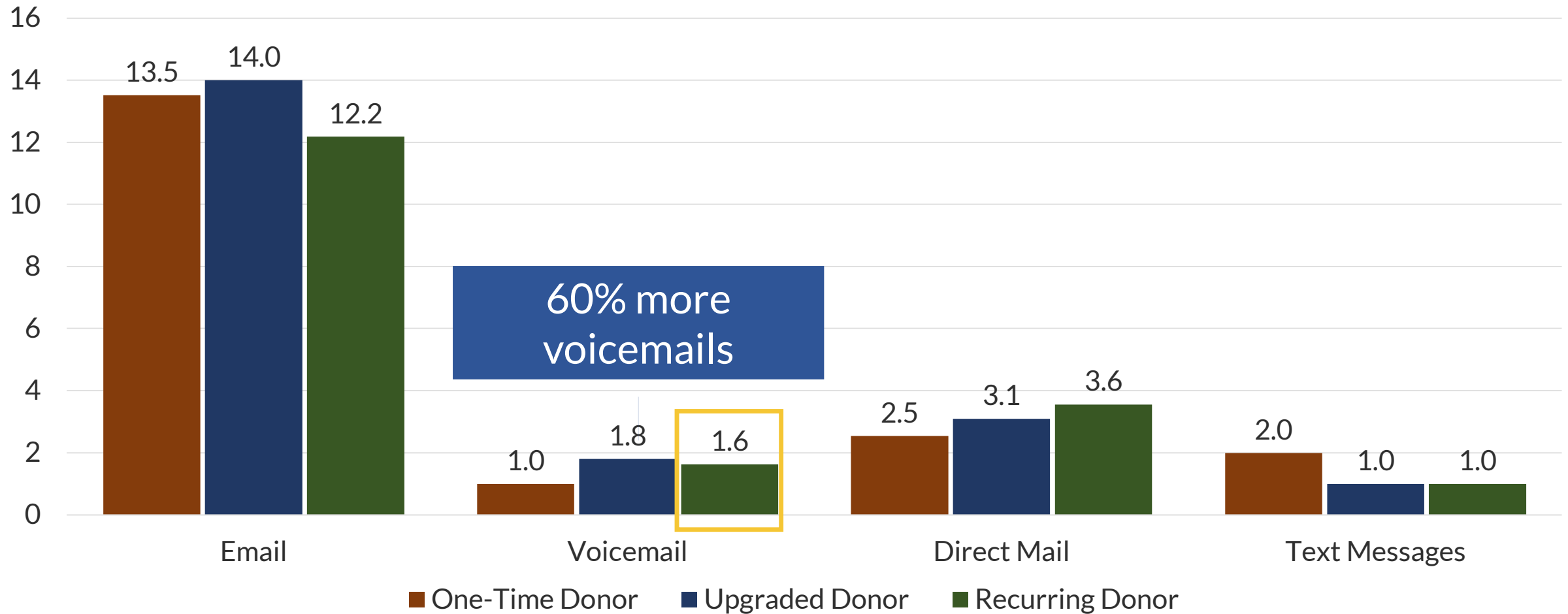
# Channel Frequency by Donor

For those using each channel, how much did they send on average?



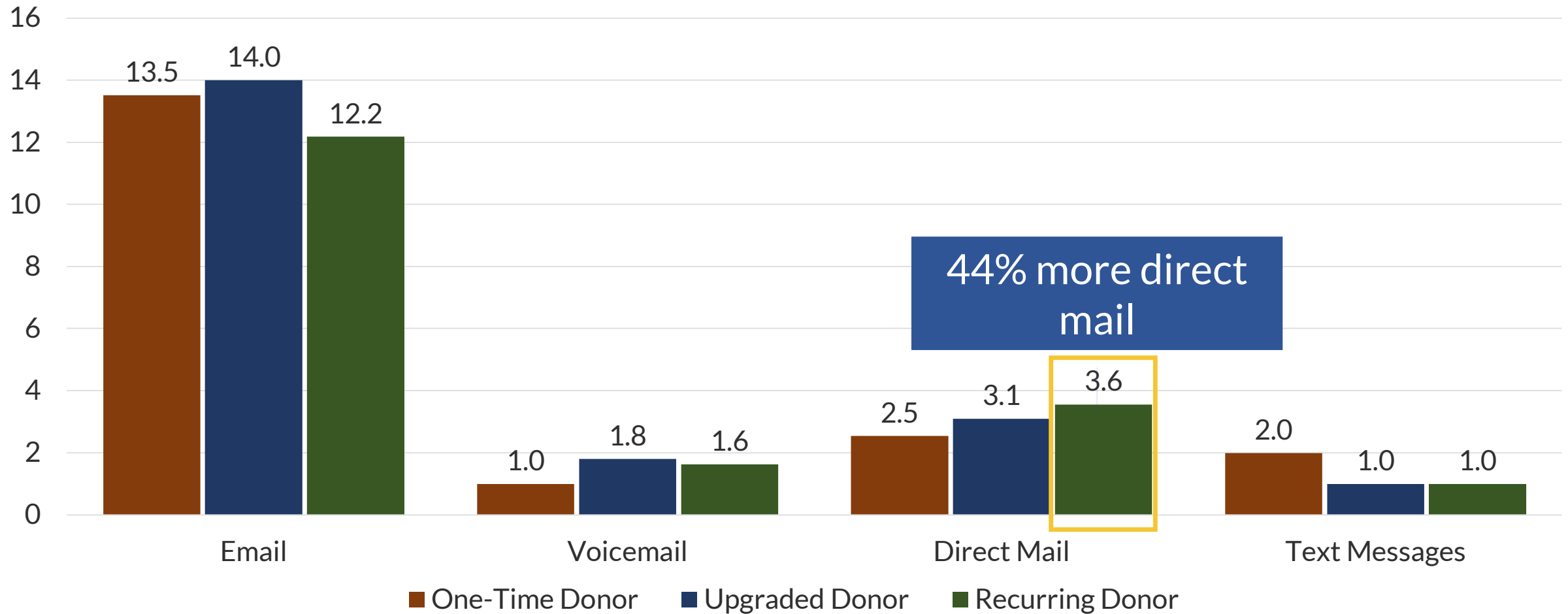
# Channel Frequency by Donor

For those using each channel, how much did they send on average?



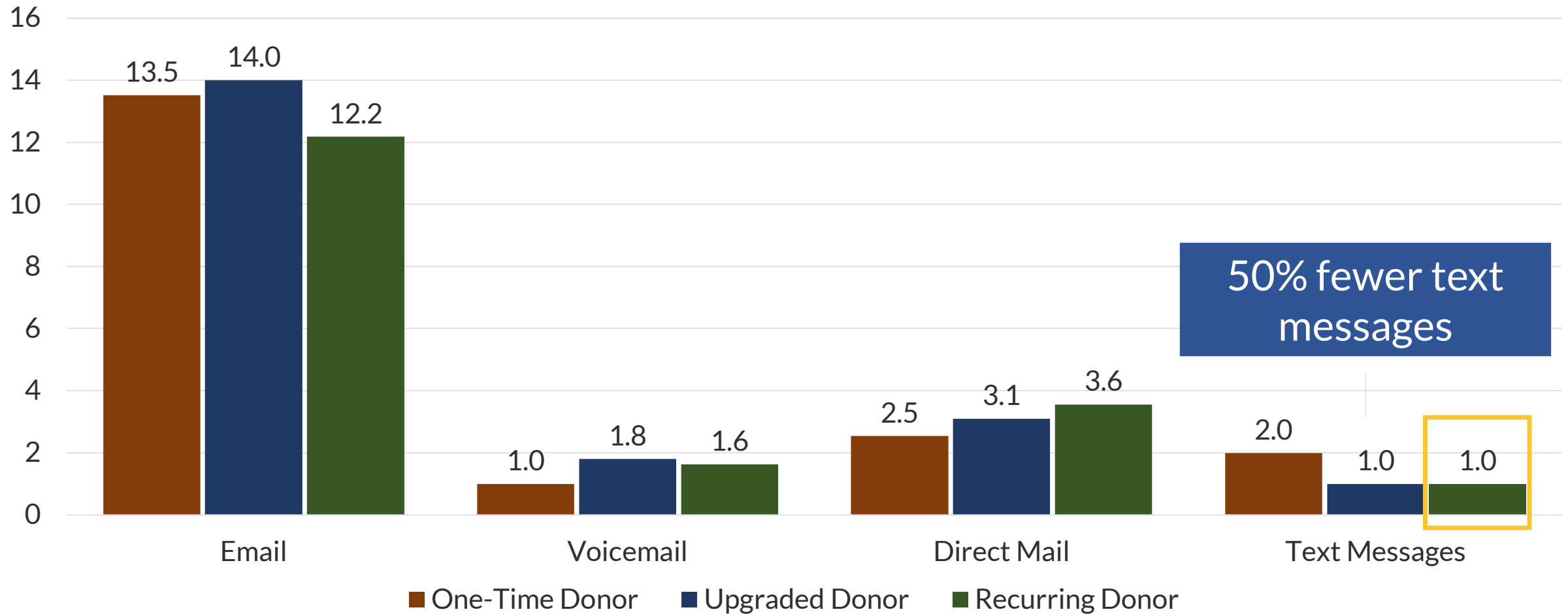
# Channel Frequency by Donor

For those using each channel, how much did they send on average?



# Channel Frequency by Donor

For those using each channel, how much did they send on average?



# Message Types

- **Receipt**

A transactional email specifically acknowledging a recent gift and listing its details

- **Cultivation**

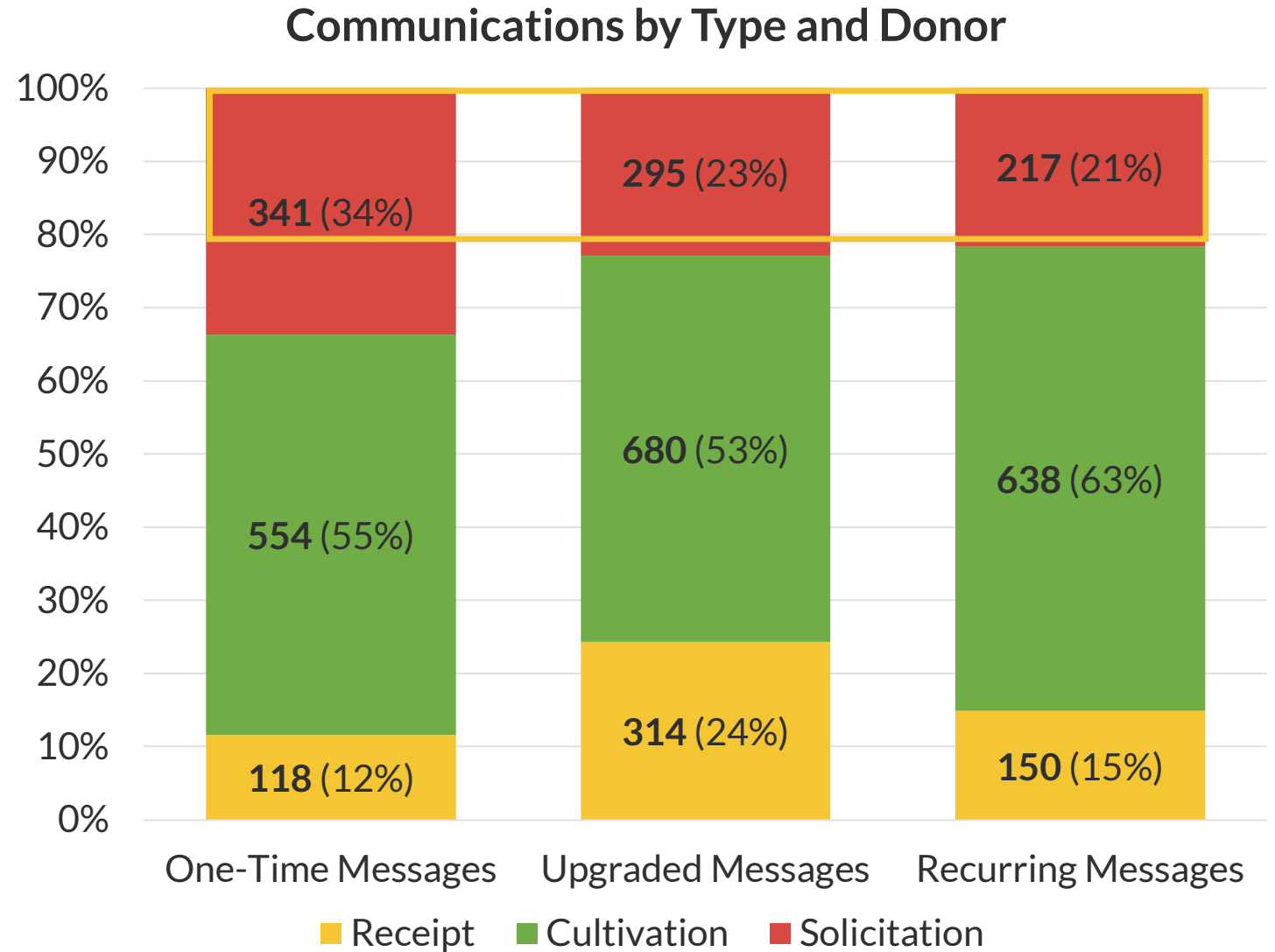
Content focused on news, content, or relationship-building, without a *primary* focus on fundraising (some may still contain soft asks)

- **Solicitation**

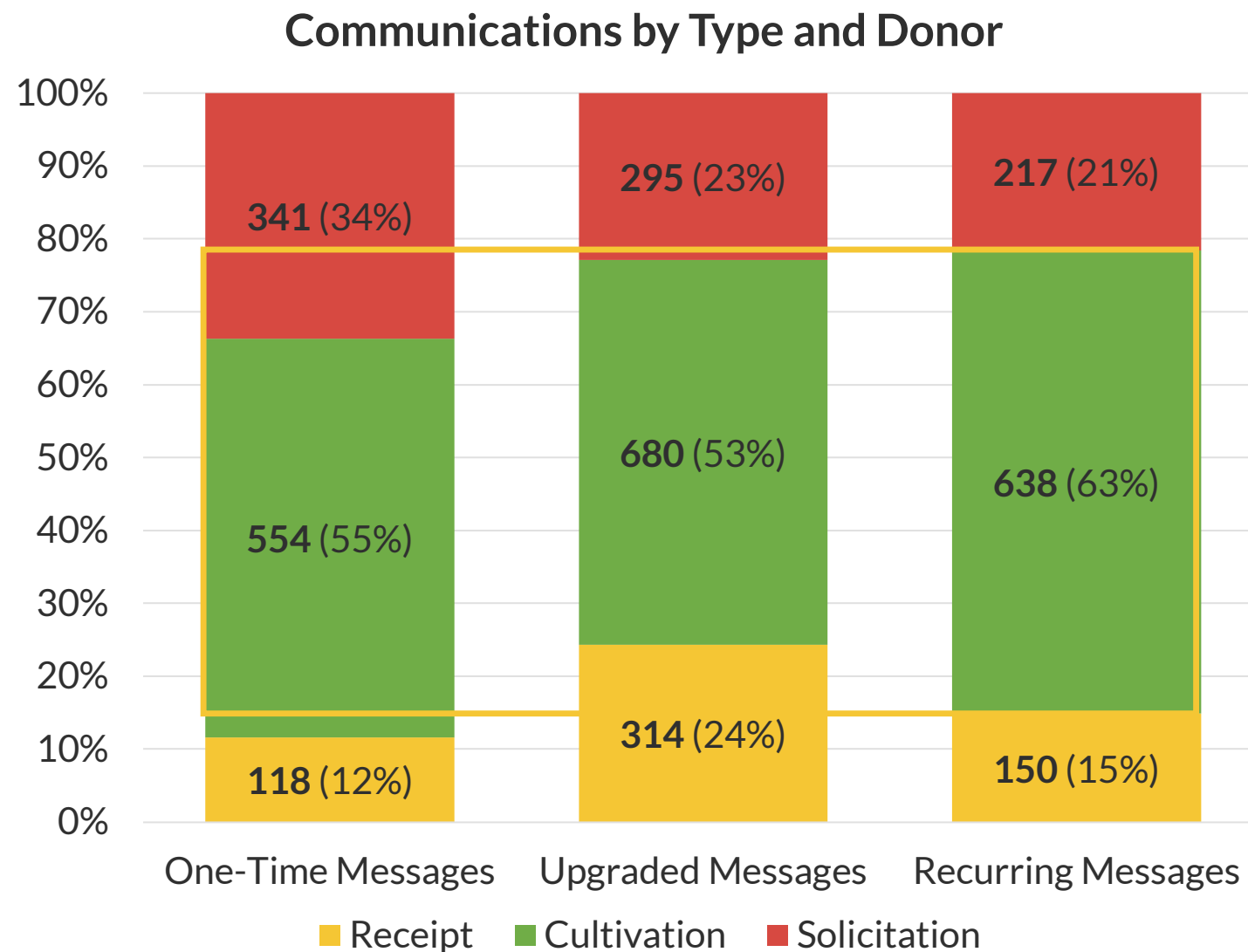
Any mailing that primarily exists primarily to generate support



Message types vary by donor with recurring receiving less appeals.

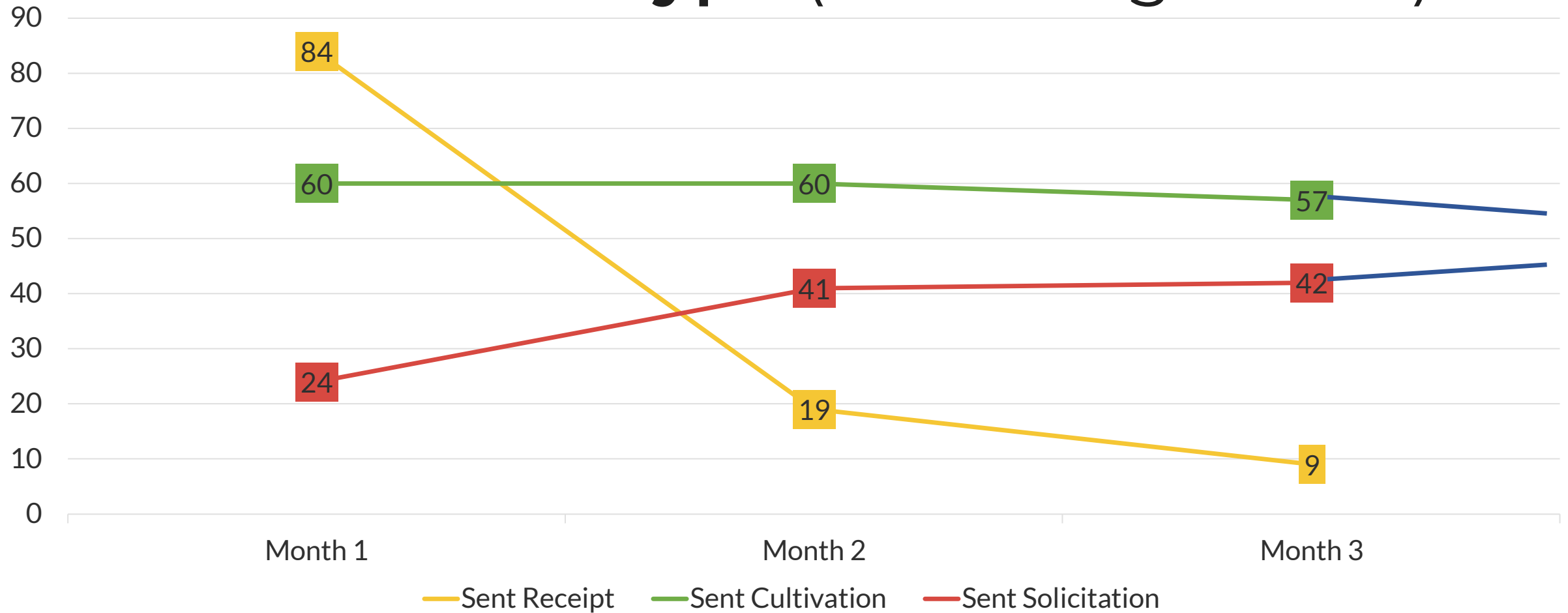


Message types vary by donor with recurring receiving less appeals and more cultivation.

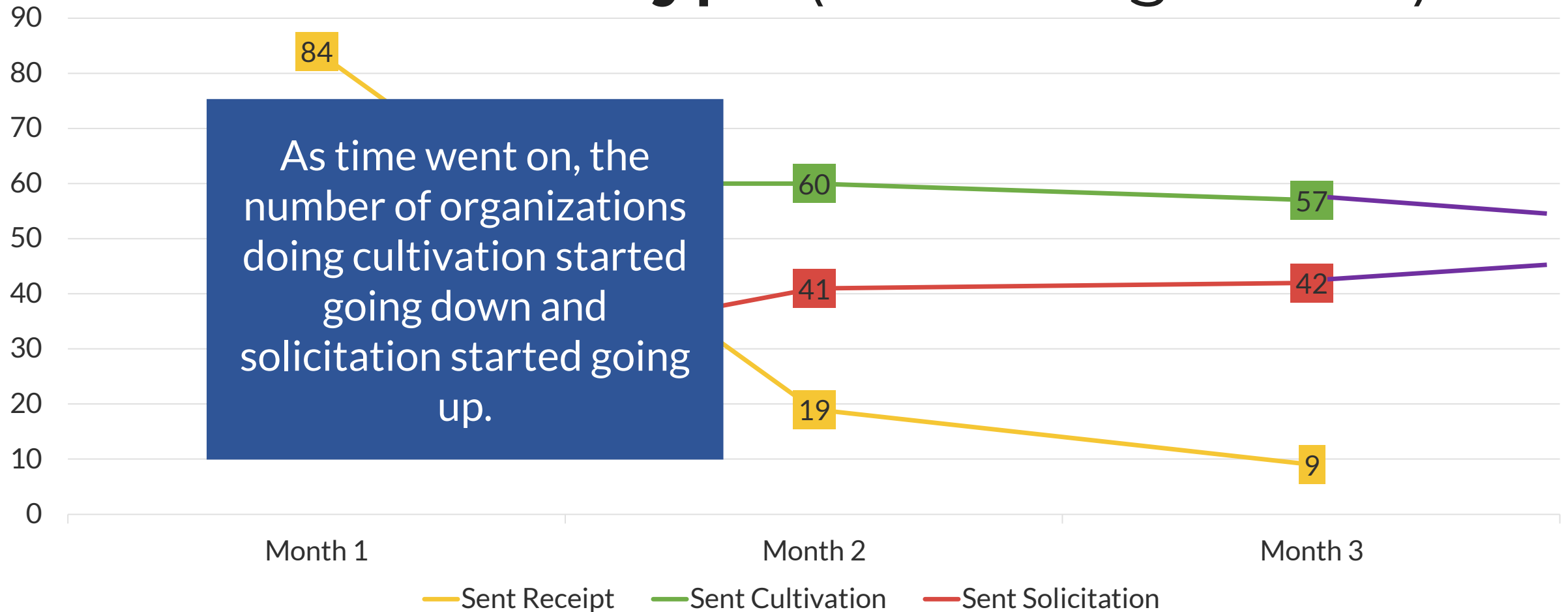


MORE CULTIVATION AND  
LESS SOLICITATION IS  
GENERALLY GOOD **BUT...**

# Number of Organizations by Communication Type (Recurring Donor)

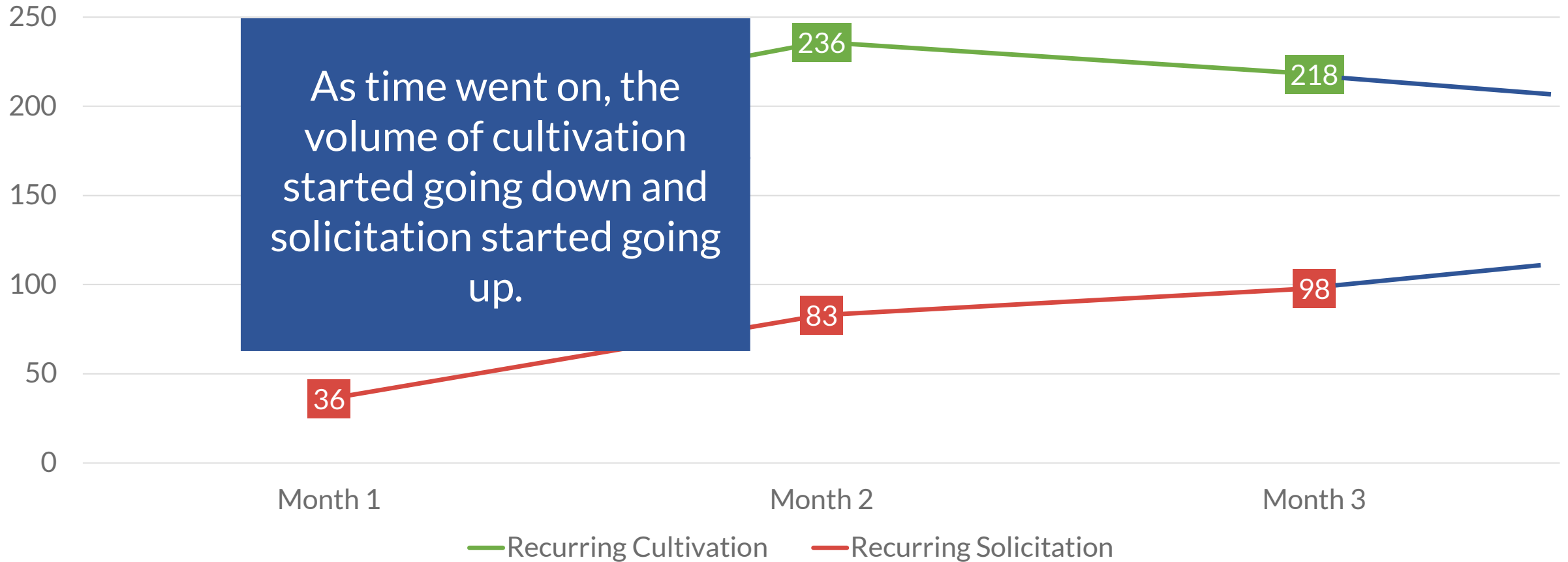


# Number of Organizations by Communication Type (Recurring Donor)



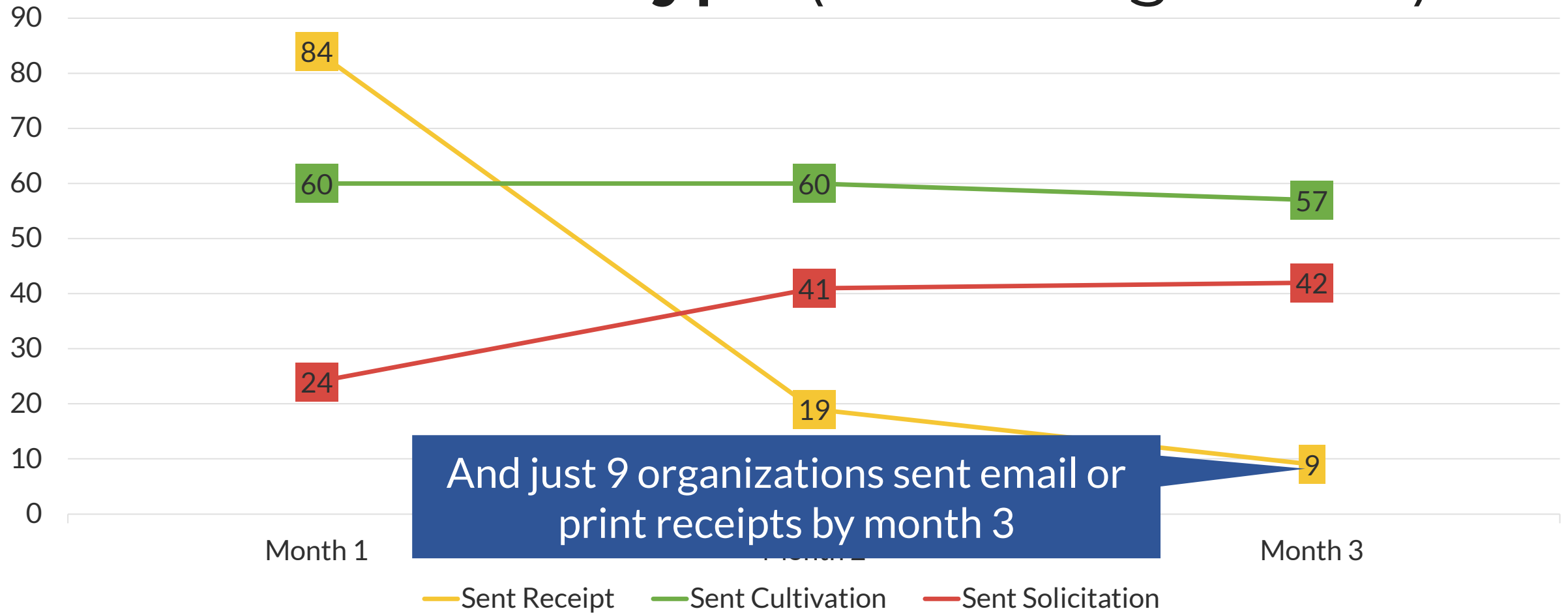


# Number of Communications by Type (Recurring Donor)

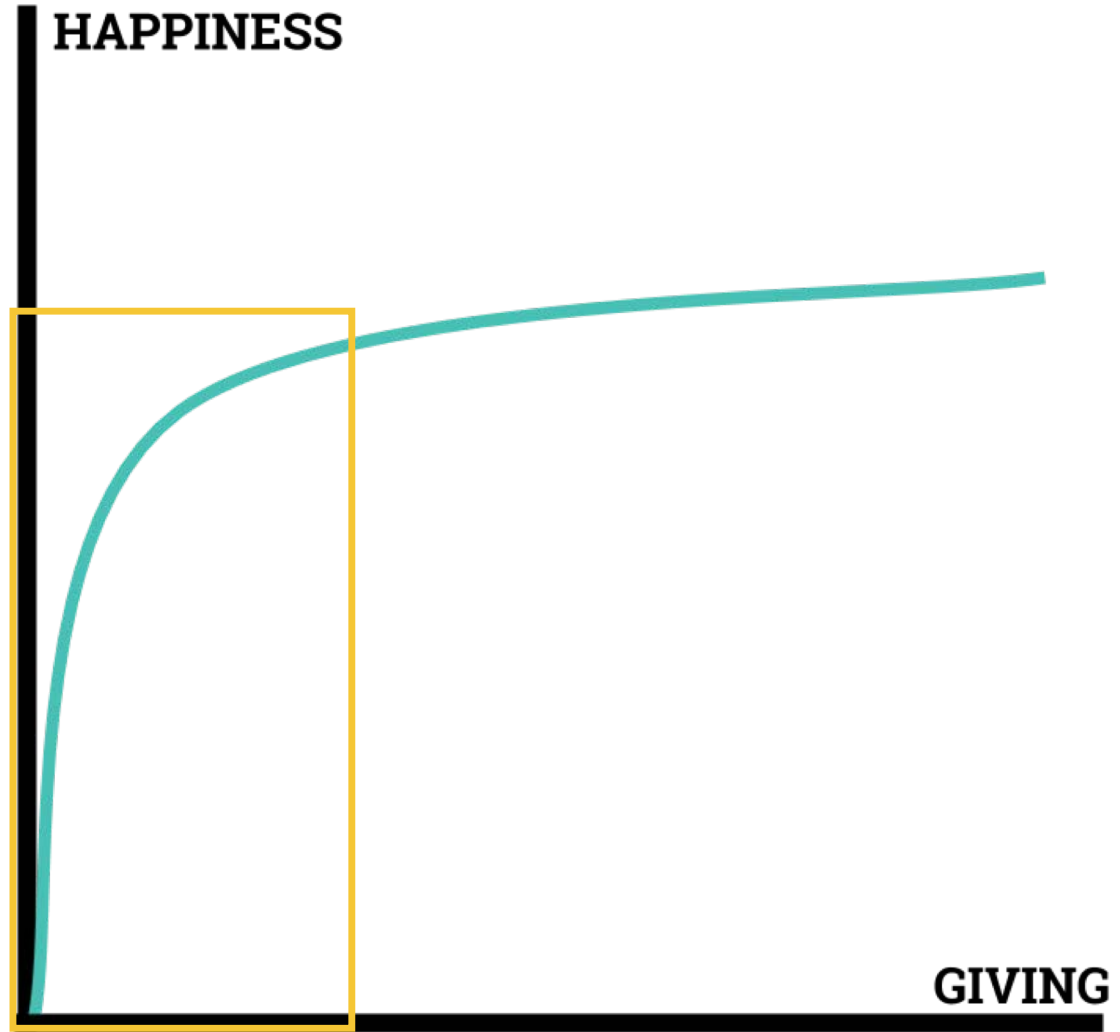
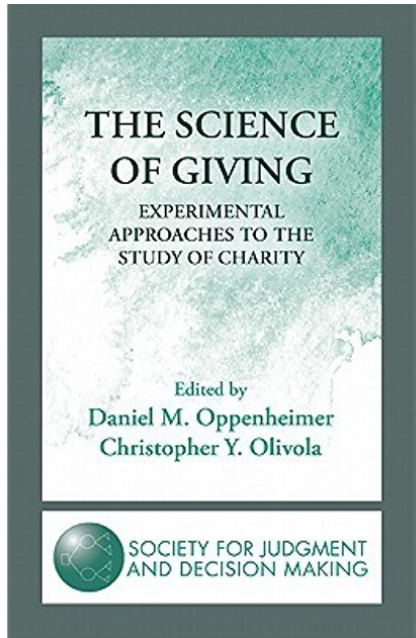


**TRY HAVING A LONGER-TERM  
COMMUNICATIONS PLAN SPECIFIC  
TO RECURRING DONORS (NOT JUST  
IMMEDIATELY AFTER).**

# Number of Organizations by Communication Type (Recurring Donor)



# Remember This...

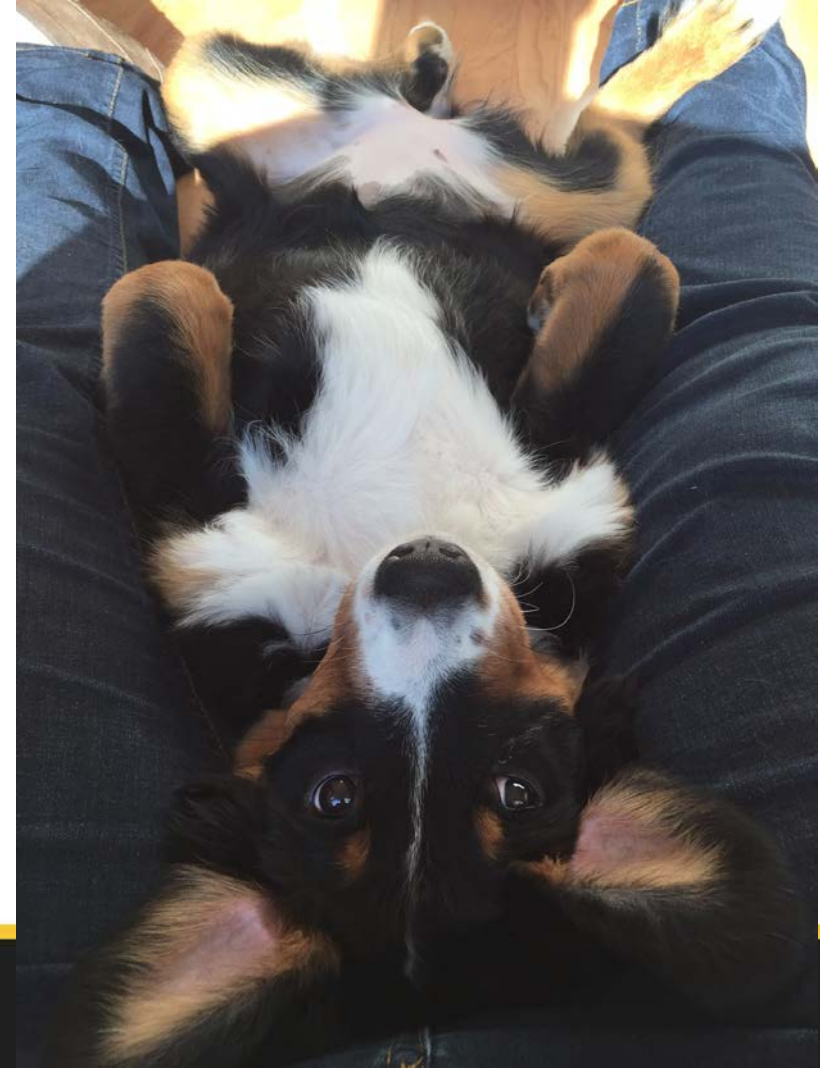


# How We Should Treat Recurring Donors...

NOT THIS



BUT THIS





A glowing lightbulb is centered in the background, emitting a warm yellow light that fills the entire frame. The lightbulb's filament is visible, and its glow creates a soft, circular halo effect. The overall color palette is a range of yellow tones, from a pale, almost white glow around the bulb to a deeper, golden yellow at the edges.

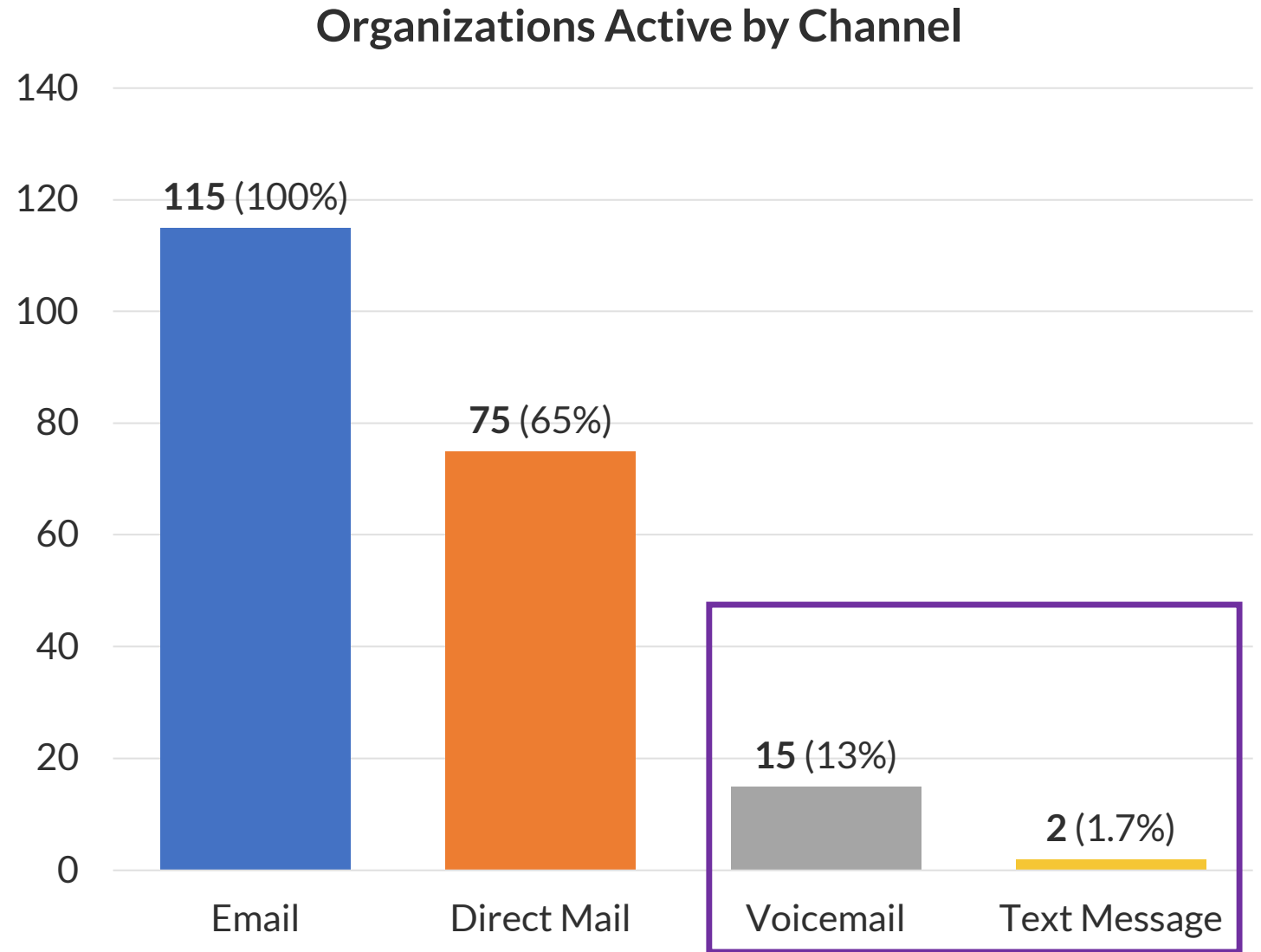
**TRY SENDING A THANK  
YOU/RECEIPT EVERY MONTH.**

A person with short dark hair, wearing a blue and white striped sweater, is seen from behind, looking at a wall covered in numerous sticky notes and diagrams. The scene is dimly lit, with a blue tint. The text "2. PHONE AND TEXT WERE NOT USED VERY OFTEN." is overlaid in large white capital letters.

**2. PHONE AND TEXT WERE  
NOT USED VERY OFTEN.**

Just 15  
organizations  
called us.

Only 2 sent text  
messages.



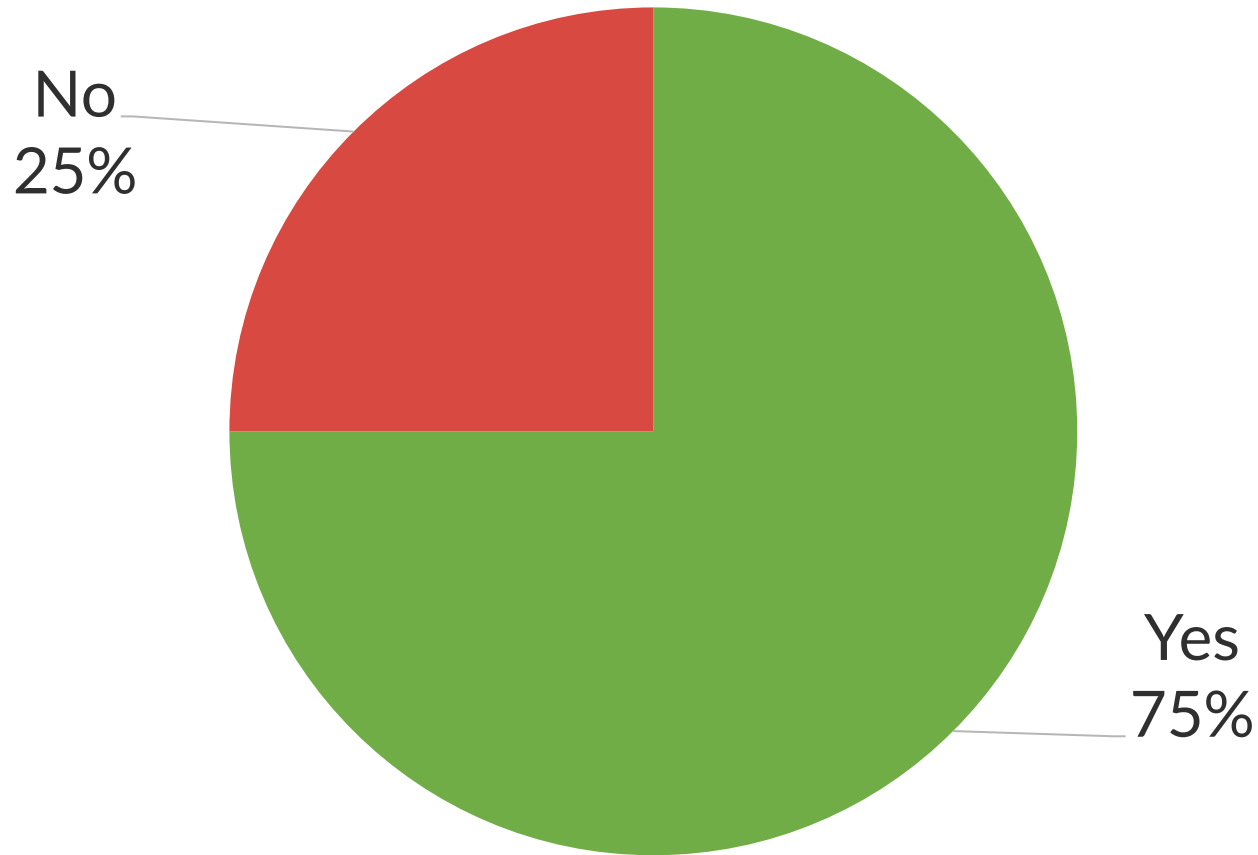
A DONOR'S SECOND YEAR VALUE  
COULD BE UP TO 40% HIGHER IF THEY  
RECEIVED A THANK YOU CALL.

**TRY CALLING AND/OR  
TEXTING YOUR DONORS.**

# WHY SO LITTLE USAGE?



Did the organization ask for phone number?



1 out of 4 nonprofits do not collect a phone number on their donation forms

# Remember This from the Research Library?

## CONTROL

**Your Name**

First Name  Last Name

Email Address

Country

Street Address

Street Address 2

City  State

Zip Code

## TREATMENT

**Your Name**

First Name  Last Name

Email Address

Country

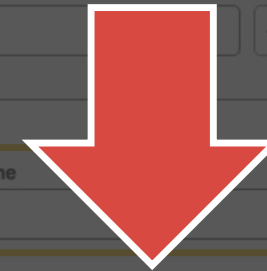
Street Address

Street Address 2

City  State

Zip Code

Cell Phone



43%

In Donations

# From the Research Library

## CONTROL

**My Gift Amount**

\$

All gifts above \$500 will receive a personalized, engraved brick on Hillsdale's Liberty Walk. [See an example.](#)

**Billing Information**

First Name \*

Last Name \*

Email Address \*

Country \*

Address \*

City \*

State \*

Zip Code \*

☐ Is your shipping information different than the billing address?

## TREATMENT

**My Gift Amount**

\$

All gifts above \$500 will receive a personalized, engraved brick on Hillsdale's Liberty Walk. [See an example.](#)

**Billing Information**

First Name \*

Last Name \*

Email Address \*

Country \*

Address \*

City \*

State \*

Zip Code \*

Phone

☐ Is your shipping information different than the billing address?

No Significant  
Difference



**TRY MAKING PHONE NUMBER  
OPTIONAL ON DONATIONS (IF YOU'RE  
GOING TO ACTUALLY USE IT).**

A person is seen from behind, wearing a blue and white striped sweater. The background is a wall covered with numerous sticky notes, some of which contain diagrams and text. The entire image has a blue tint.

**3. COMMUNICATIONS  
WERE NOT VERY  
PERSONAL.**

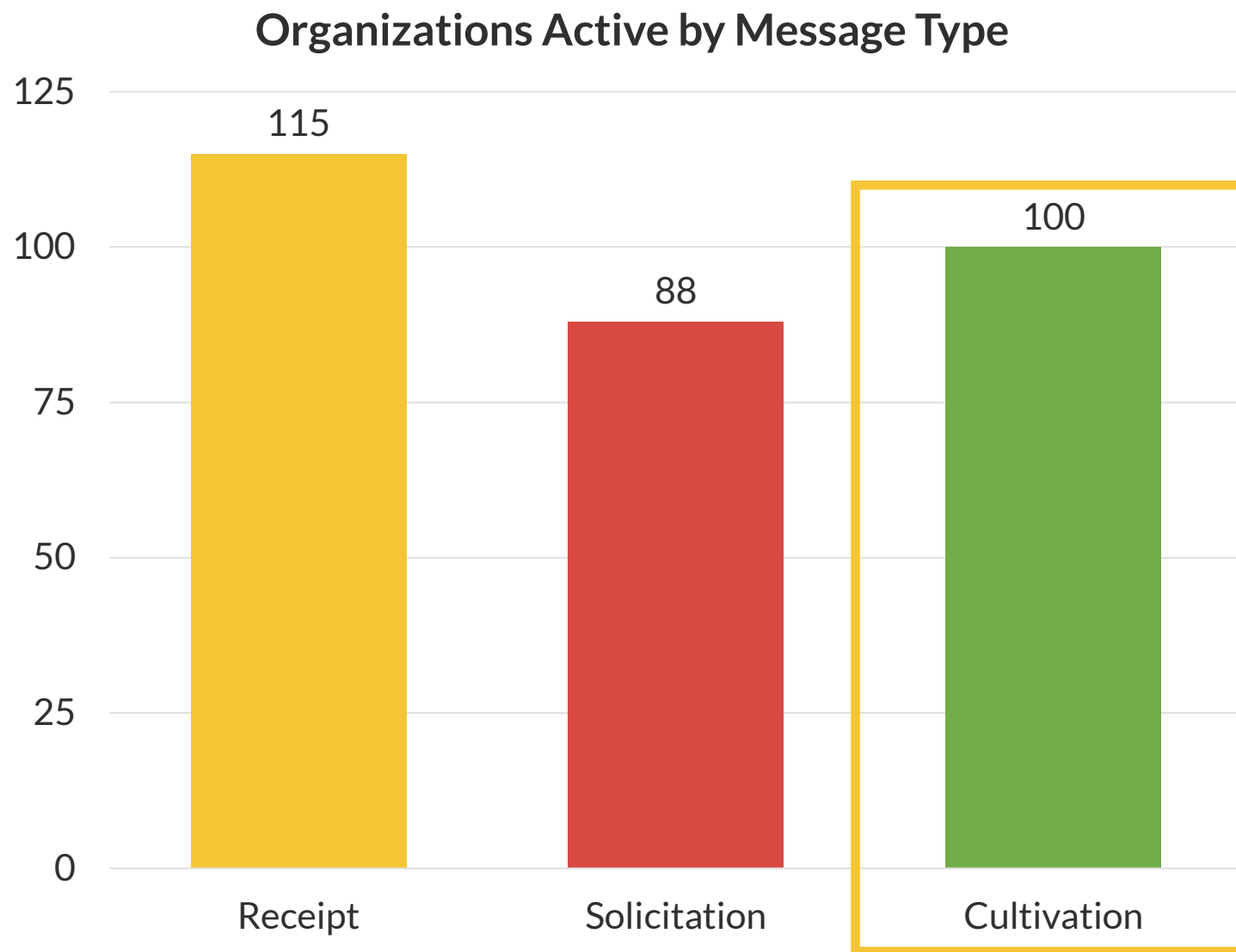
**9%** OF ORGANIZATIONS DID NOT  
SEND ANY COMMUNICATIONS TO  
THEIR MONTHLY DONORS.



A man with a beard and mustache, wearing a red military uniform with a black peaked cap and several medals on his chest, has a surprised or excited expression. The background is a blurred indoor setting.

**TRY COMMUNICATING  
WITH YOUR MONTHLY  
DONORS.**

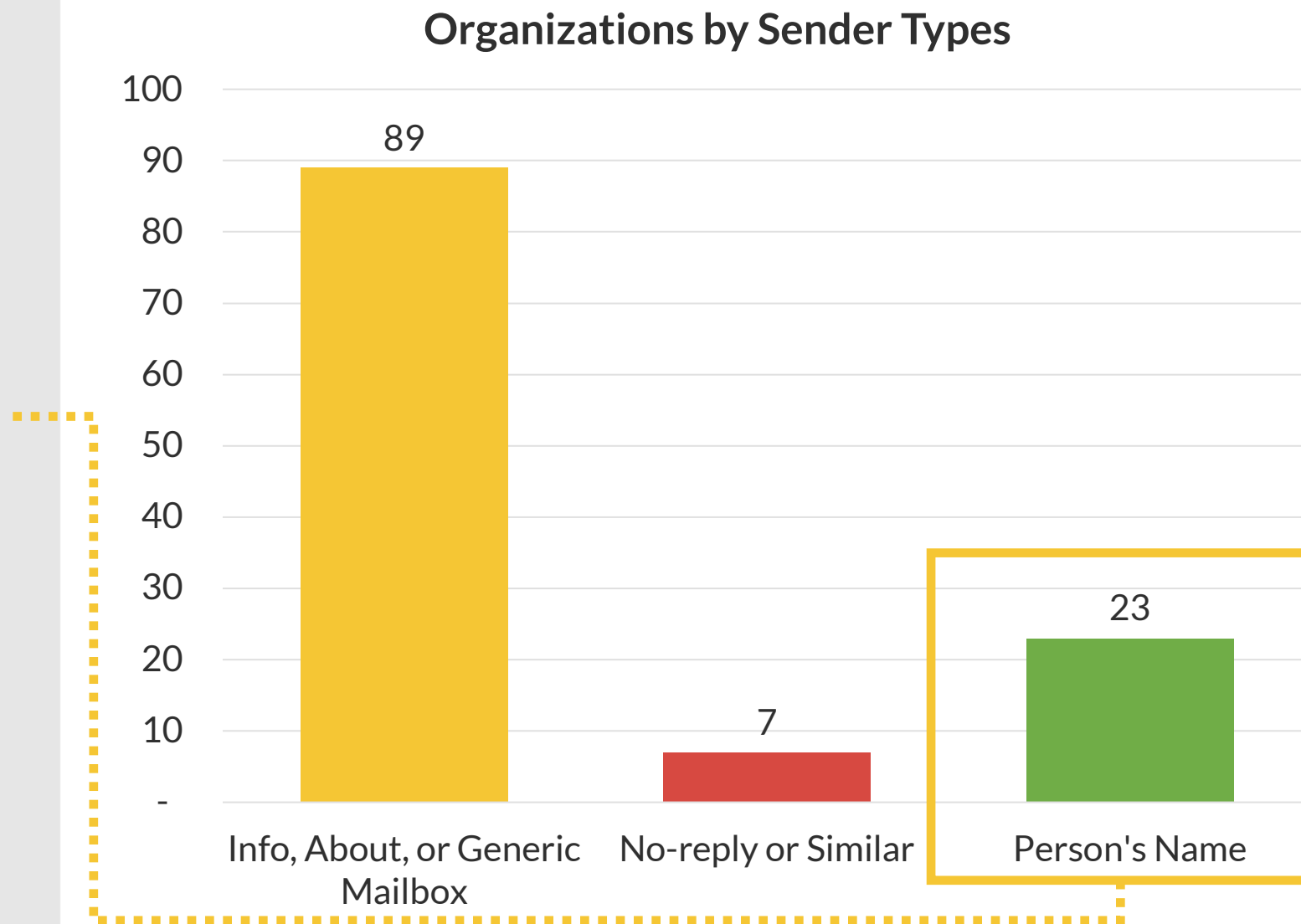
13% of organizations didn't send cultivation content to any of the donors.



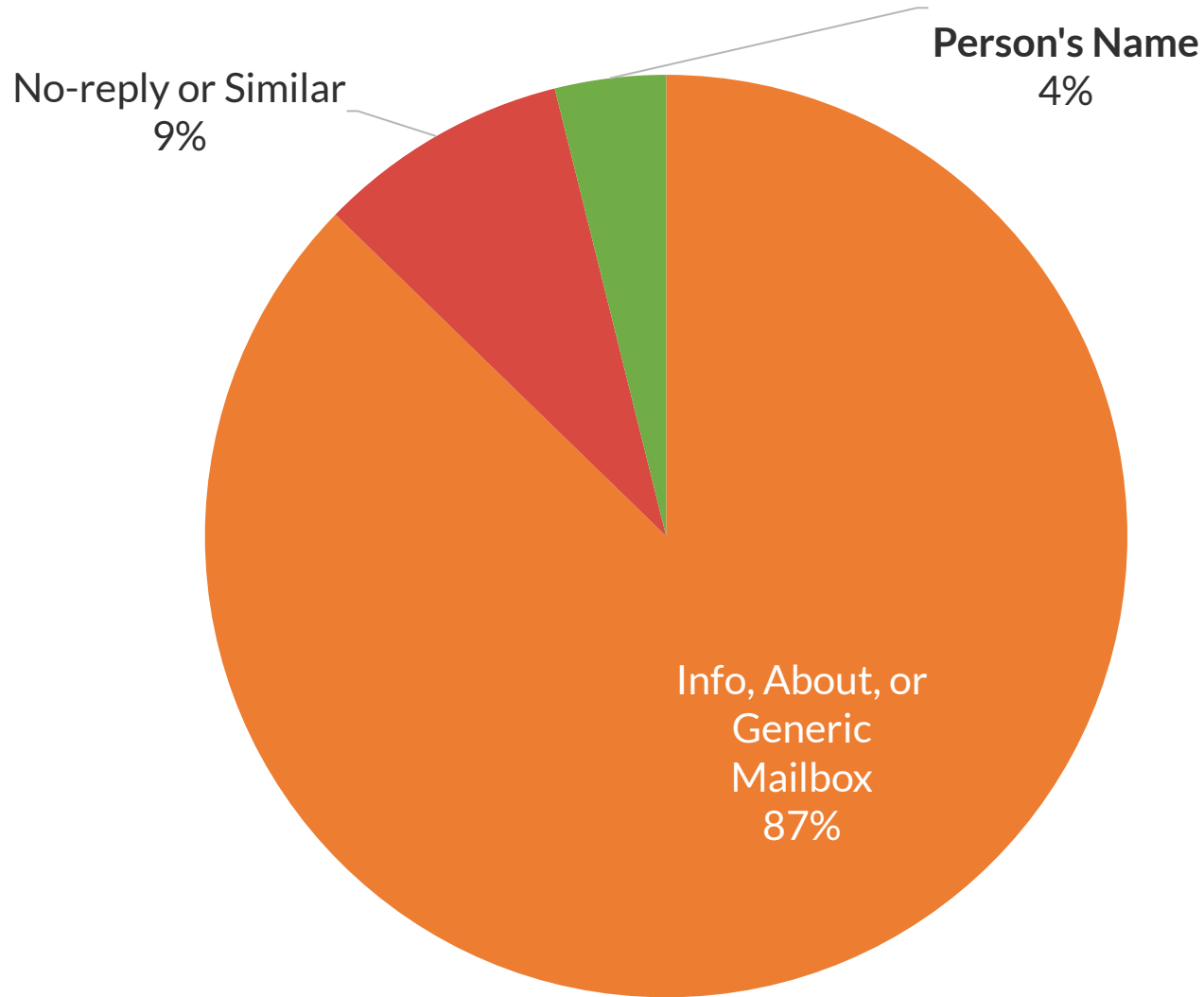
A man with a beard and mustache, wearing a red military uniform with a black peaked cap and several medals on his chest, has a surprised expression. The background is a blurred indoor setting with large windows.

**TRY CULTIVATING ALL  
YOUR DONORS.**

Just 1 in 5 organizations ever send a message from an address representing a real person.



## Emails by Sender Email Type



The majority of individual messages came from generic or “no-reply” addresses

**Subject:** Donation Form Acknowledgement

**From:** [REDACTED] <donorreceipt@[REDACTED]>

**To:** [REDACTED]

**Date Sent:** Tuesday, February 6, 2018 1:41:21 PM GMT-06:00

**Date Received:** Tuesday, February 6, 2018 1:41:22 PM GMT-06:00



**Subject:** Donation Form Acknowledgement

**From:** [REDACTED] <donorreceipt@[REDACTED]>

**To:** [REDACTED]

**Date Sent:** Tuesday, February 6, 2018 1:41:21 PM GMT-06:00

**Date Received:** Tuesday, February 6, 2018 1:41:22 PM GMT-06:00

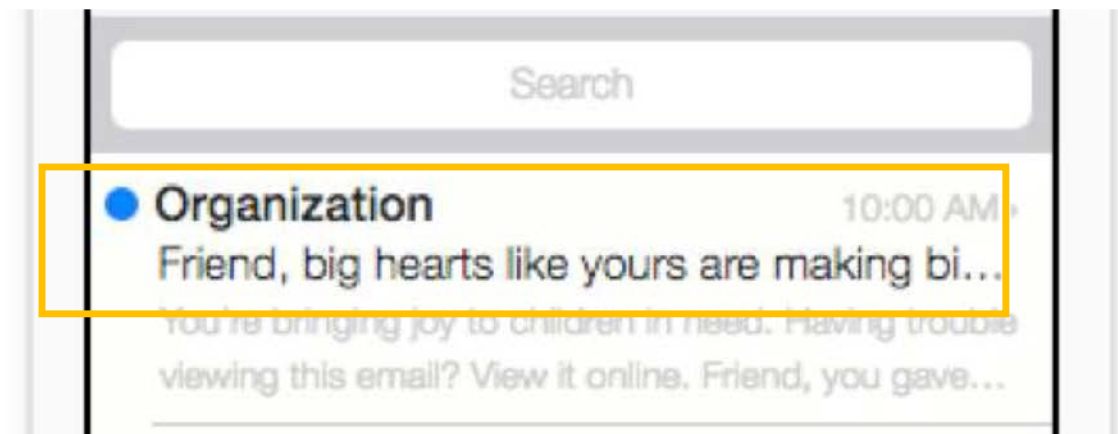
**Subject:** Donation Form Acknowledgement

**From:** [redacted] <donorreceipt@[redacted]>

**To:** [redacted]

**Date Sent:** Tuesday, February 6, 2018 1:41:21 PM GMT-06:00

**Date Received:** Tuesday, February 6, 2018 1:41:22 PM GMT-06:00



# How Do We Triage Our Inboxes



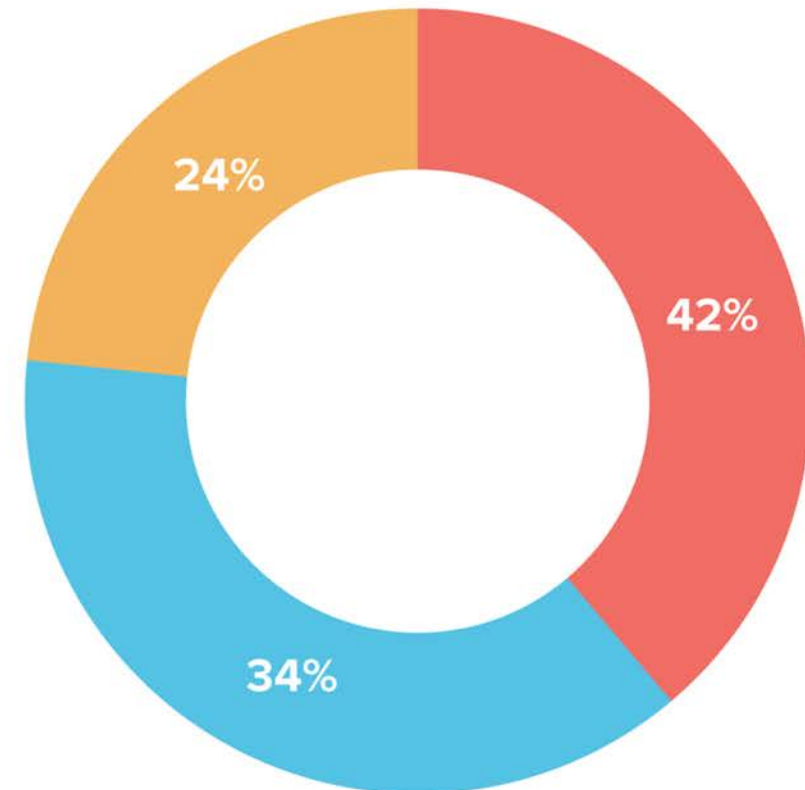
## Inbox at a Glance

What's the first thing you look at when deciding whether to open an email?

● Sender or from name

● Subject line

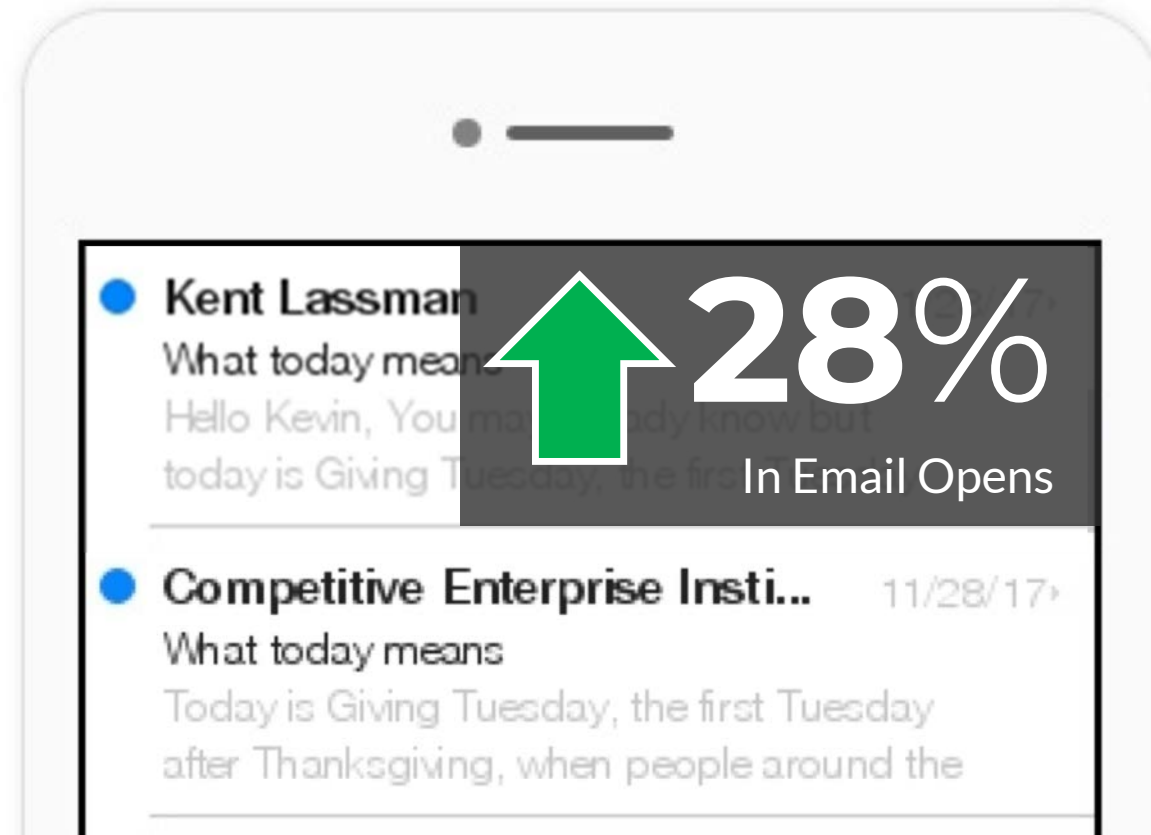
● Preview text



# From the Research Library

B

A

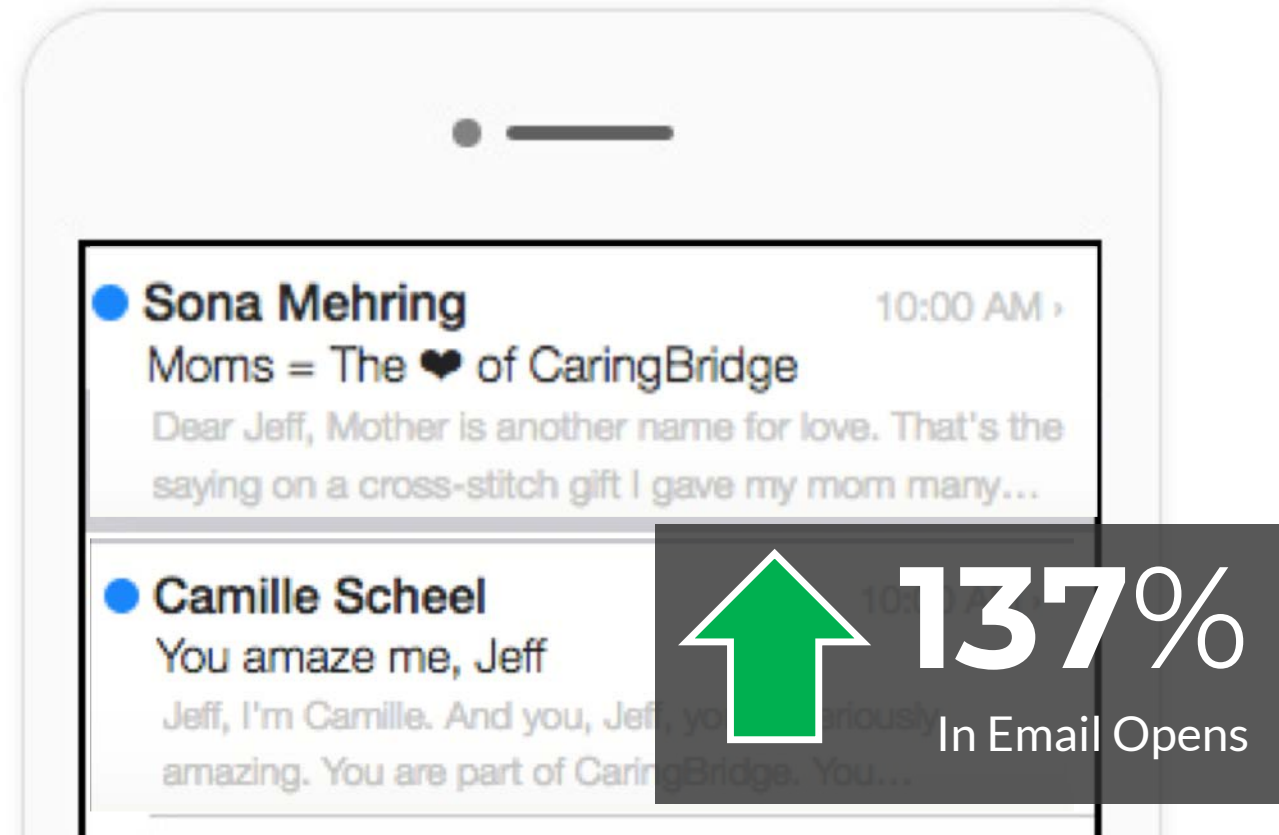


**TRY SENDING YOUR EMAILS  
FROM A PERSON (NOT AN  
ORGANIZATION).**

# From the Research Library

A

B





A large, glowing lightbulb is centered in the background. Inside the bulb, a person's face is visible, looking upwards with a thoughtful expression. The entire image has a warm, yellowish-gold color scheme.

# TRY USING 'YOU' IN YOUR SUBJECT LINES.

# How First-name Personalization Affects Email Engagement

Experiment ID: #5707

## CONTROL

At the beginning of October, our goal was to reach as many women as possible with our new eBook, *What Every Woman Needs to Know*.

Now that Breast Cancer Awareness Month has come to an end, we just wanted to let you know that we exceeded our expectations.

Thanks to the generosity of donors around the country, the campaign was a massive success!

But that doesn't mean we can stop working hard to educate and empower women to take control of their own breast health.

You can help us do this at any time—[every dollar you give](#) means that more women can be proactive about their health.

We'd also love it if you shared *What Every Woman Needs to Know* on Facebook...just [click here](#) and share it with your friends!

Thanks for joining us!

Candice Boeck  
Donor Relations Manager  
National Breast Cancer Foundation



## TREATMENT

Hi Jeff,

At the beginning of October, our goal was to reach as many women as possible with our new eBook, *What Every Woman Needs to Know*.

Now that Breast Cancer Awareness Month has come to an end, we just wanted to let you know that we exceeded our expectations.

Thanks to the generosity of donors around the country, the campaign was a massive success!

But that doesn't mean we can stop working hard to educate and empower women to take control of their own breast health.

You can help us do this at any time—[every dollar you give](#) means that more women can be proactive about their health.

We'd also love it if you shared *What Every Woman Needs to Know* on Facebook...just [click here](#) and share it with your friends!

Thanks for joining us!

Candice Boeck  
Donor Relations Manager  
National Breast Cancer Foundation



270%

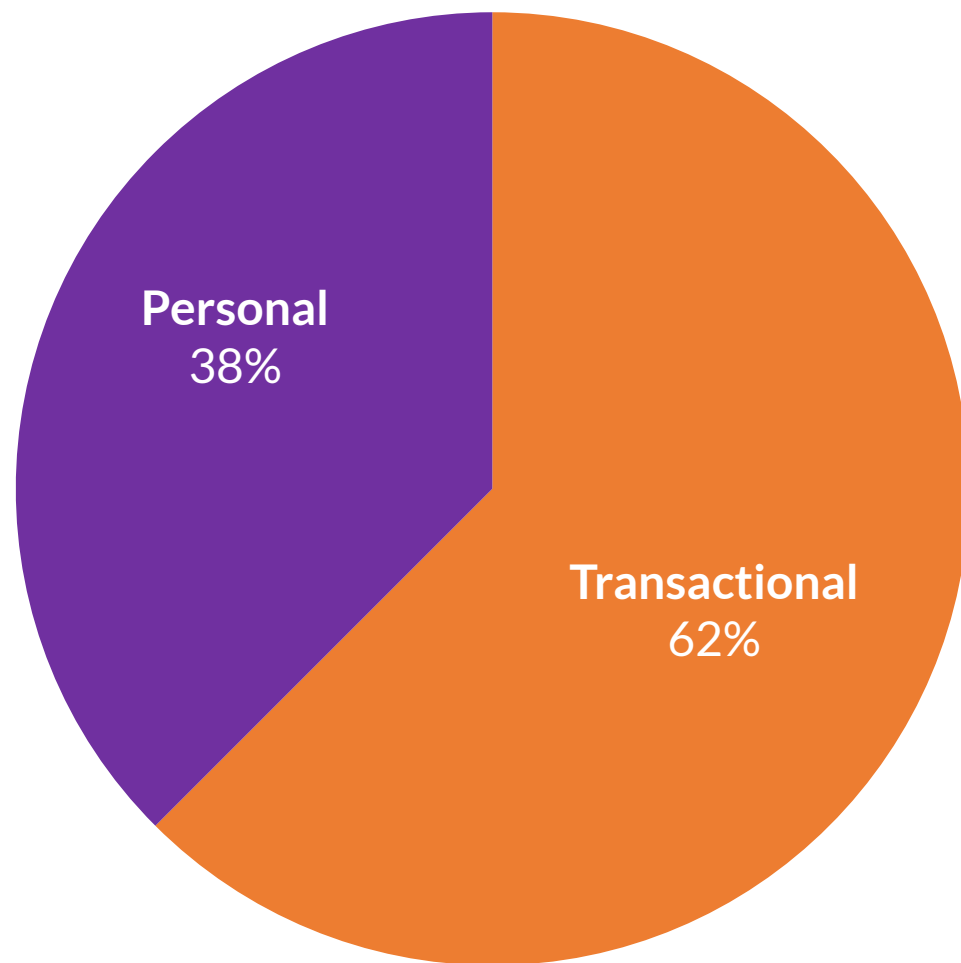
In Clicks



**TRY USING PEOPLE'S FIRST NAME  
(OR AT LEAST THEIR NAME).**

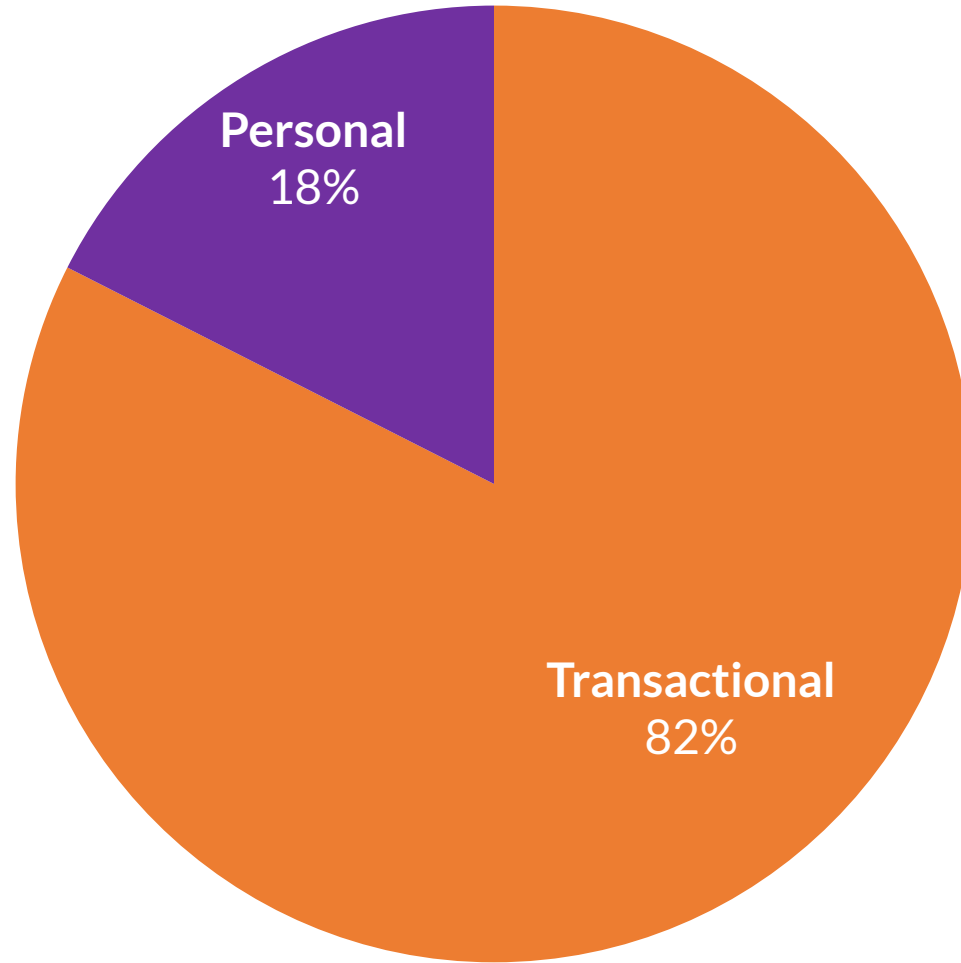
# WHAT ABOUT CUSTOMER SERVICE EMAILS?

## 'Get Back' Contact Type (Lost Card)



Of the organizations who did reach out directly, the majority were from transactional or system-generated emails.

## 'Get Back' Contact Type (Cancelled Card)



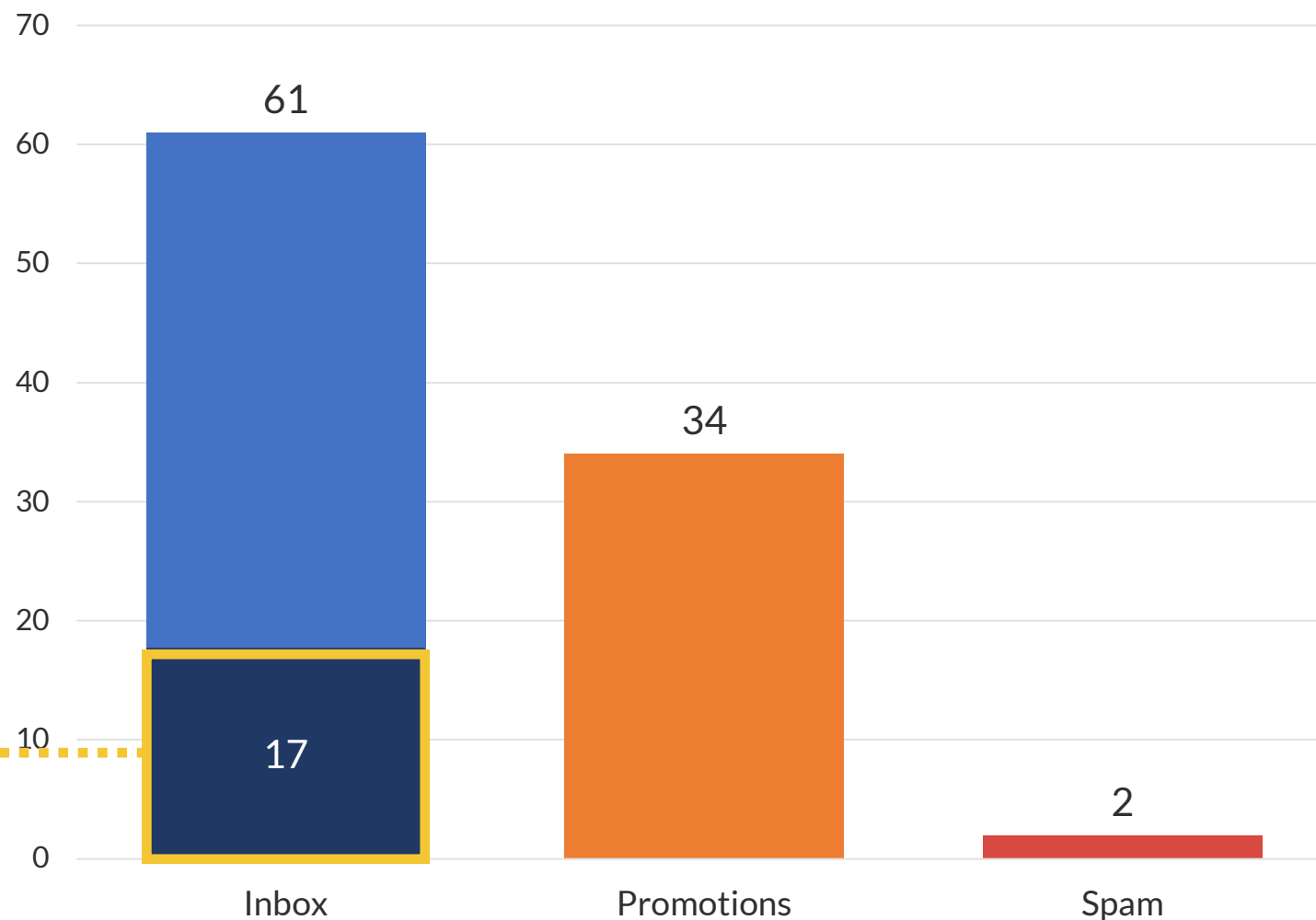
Fewer than 1 in 5 'get back' messages for the cancelled card were sent from a real person at the organization.



37% of these emails weren't delivered to the main inbox

Interestingly, every single email from a real person was delivered to the inbox

## Get Back Emails Delivered by Folder





**TRY MAKING YOUR CUSTOMER  
SERVICE EMAILS LOOK, SOUND, AND  
FEEL LIKE THEY ARE FROM A PERSON.**



PEOPLE



GIVE TO

PEOPLE



NOT

EMAIL  
MACHINES





# EMAIL FUNDRAISING OPTIMIZATION

## *FREE ONLINE COURSE*

ACTIVATE YOUR FREE COURSE TODAY  
[nextafter.com/email](https://nextafter.com/email)



# WHAT ABOUT OTHER CHANNELS?


# Phone

Hello, my name is [Name]: a paid caller from MDS calling on behalf of [Organization]. I'm calling today to thank you for your generous partner for children contribution. Your kindness means so much to us and children like...



# Phone

~~Hello, my name is [Name]: a paid caller from MDS  
calling on behalf of [Organization].~~ I'm calling  
today to thank you for your generous partner for  
children contribution. Your kindness means so  
much to us and children like...

A man in a formal military uniform, including a peaked cap with a crest and a red jacket with medals, has a surprised or pleading expression on his face. The background is a blurred indoor setting.

**TRY NOT OUTSOURCING  
YOUR PERSONAL THANK YOU  
CALLS TO PAID VENDORS.**

# Mail

February 7, 2018

Dear Friend,

Welcome to ' [redacted] Jesus said, "whatever you did for one of the least of these ... you did for me" (Matthew 25:40, NIV). Thank you for answering His call to help a child and community in need. Your generous commitment is truly a blessing.

Your generosity is  
SAVING CHILDREN'S LIVES

Dear Partner,

Jeff Giddens  
Account Number: 10640-2713

Donation Date	Description	Gift
		Tha

I want to help again. Here is my gift of:

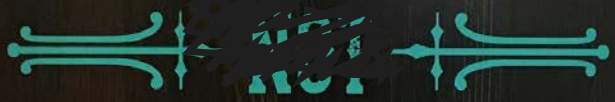
- ☐ \$\_\_\_\_\_ to use where children need it most
- ☐ I will sponsor a child in need. Here's my first monthly gift of \$39.
- ☐ Please bill my gift or sponsorship to my credit card. (See back.).
- ☐ Please e-mail me with updates on World Vision's work.  
My e-mail address is \_\_\_\_\_



PEOPLE



PEOPLE



~~EMAIL  
MACHINES~~





# 4. CUSTOMER SERVICE LEAVES MUCH TO BE DESIRED.

# Customer Service Recap

- Just **9** organizations were sending a receipt to recurring donors by month 3.
- **13%** of organizations did not cultivation communication to any donors.
- **9%** of organizations did not send any communication at all to their monthly donors.
- The **majority** of communication (both customer service and mass) did not feel very personal.



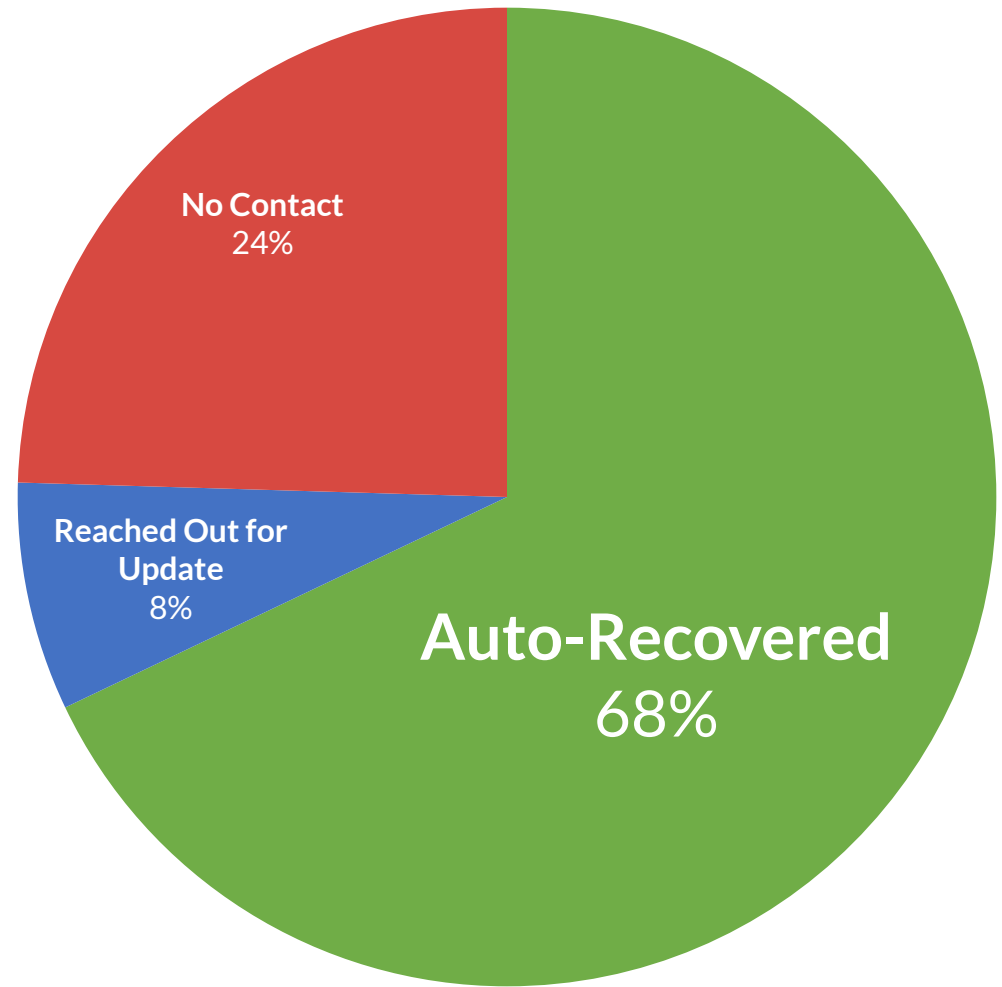
**“...WHEN IT COMES TO IMPROVING LIFETIME VALUE —  
THE ONLY TRUE METRIC THAT MATTERS — THE  
TACTICS/TECHNIQUES/FREQUENCY OF ACTIVITY FROM  
THE FUNDRAISING DEPARTMENT ACCOUNTS FOR LESS  
THAN 20% OF THE ULTIMATE VALUE ON A DONOR FILE.”**


**- Roger Craver, The Agitator**

# WHAT ABOUT LOST, STOLEN, OR CANCELLED CREDIT CARDS?

Over 2 in 3  
organizations  
automatically  
updated lost cards  
without intervention.

## Get-back Status (Lost Card)

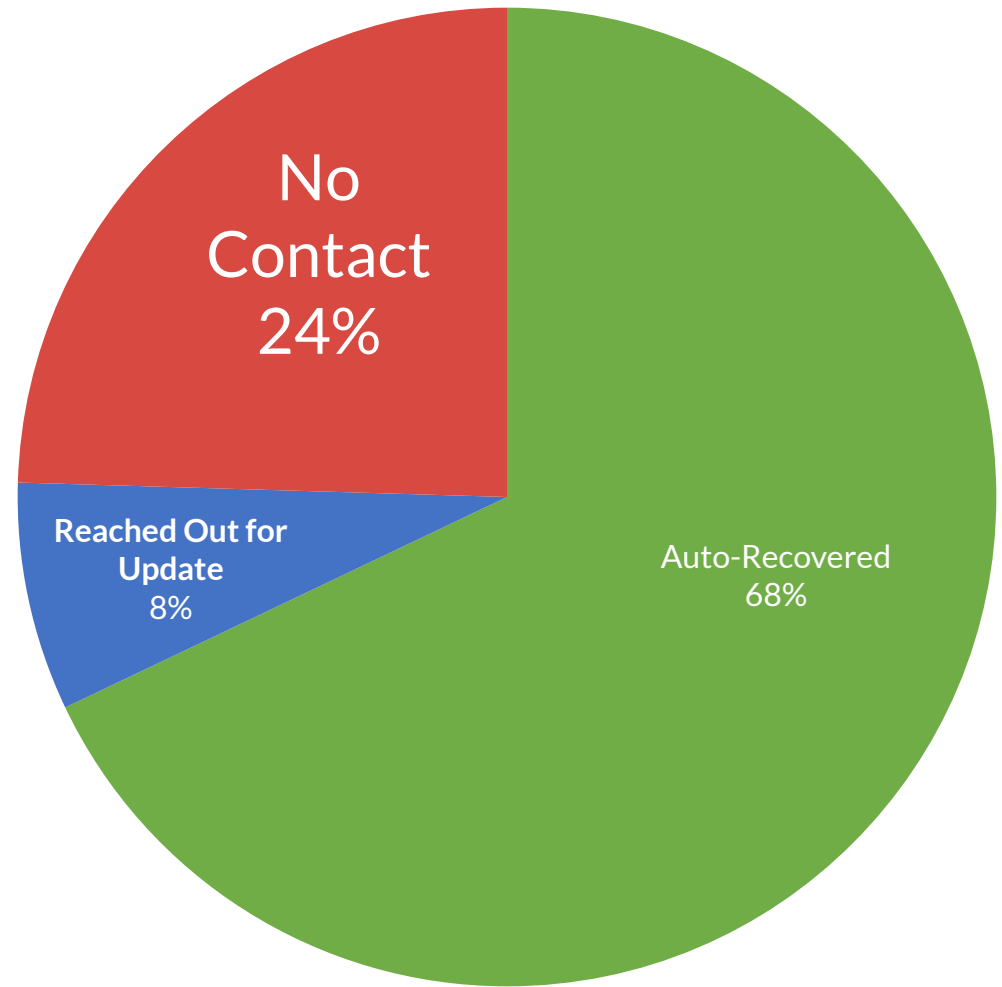




**TRY USING TOOLS, TECHNOLOGY,  
AND COMPANIES THAT AUTO-  
UPDATE CREDIT CARDS.**

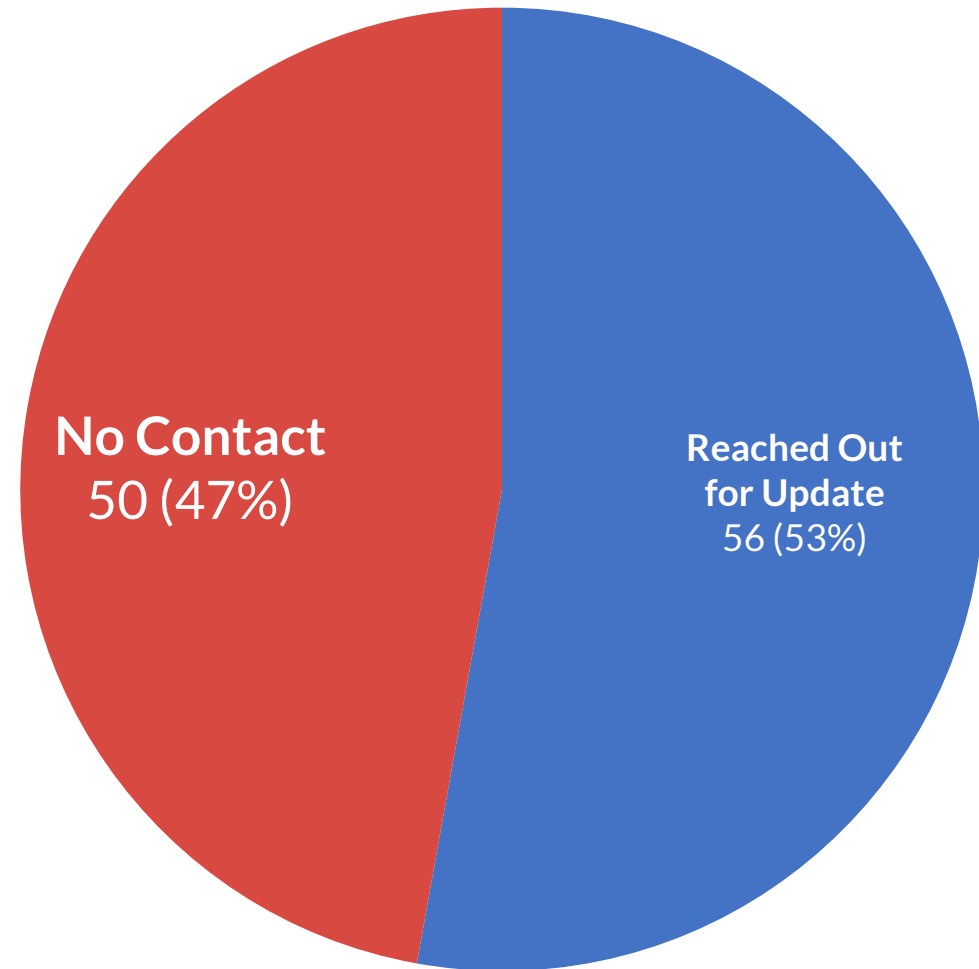
Almost a quarter of organizations did not contact us at all about a lost card.

## Get-back Status (Lost Card)



Just under half of nonprofits did not reach out to get a new card in the analysis window.

## Get-back Status (Cancelled Card)





**TRY HAVING A RESPONSE PLAN  
FOR WHEN CARDS ARE LOST  
(AND NOT AUTO-UPDATED).**

**“IF YOU CAN’T MEASURE IT,  
YOU CAN’T IMPROVE IT.”**

- Peter Drucker

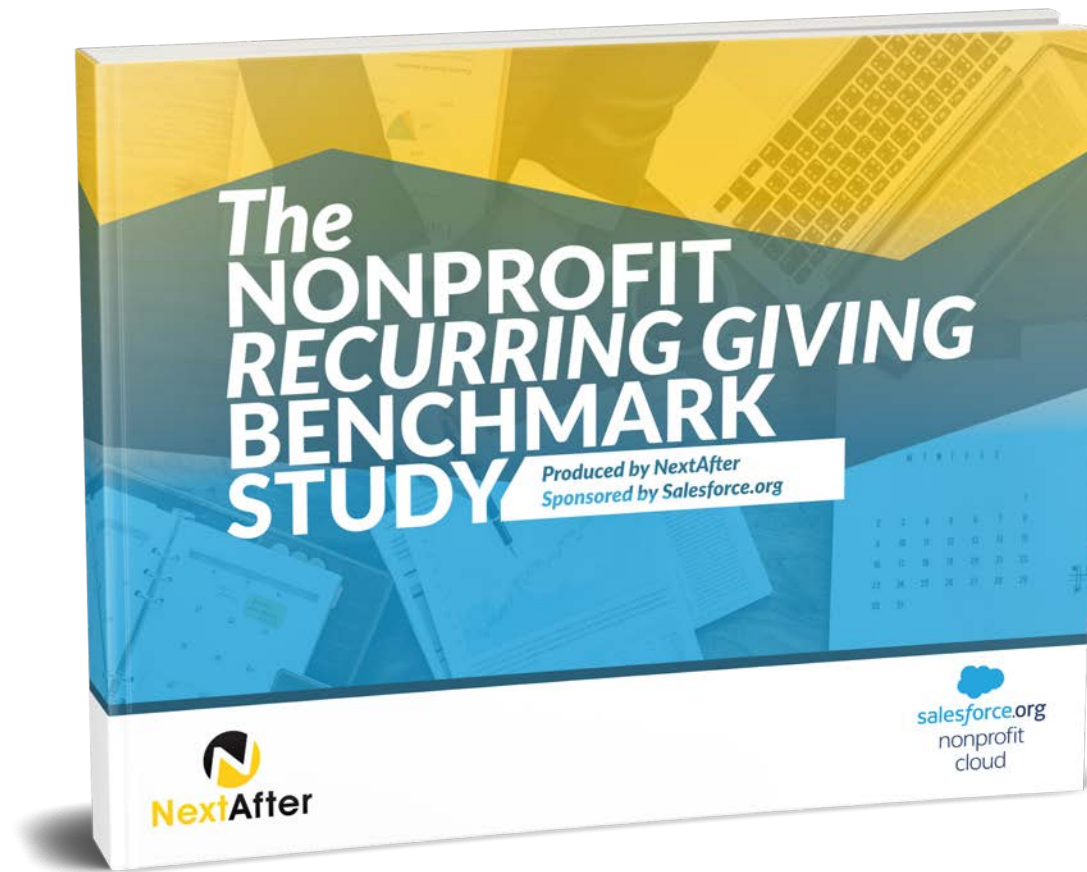
# Some of What We Learned About Recurring Giving Communications

1. Recurring donors aren't treated *that* differently.
2. Phone and text were not used very often.
3. Communications were not very personal.
4. Customer service leaves much to be desired.

# 6 Ideas to Try and Optimize Recurring Giving Communications

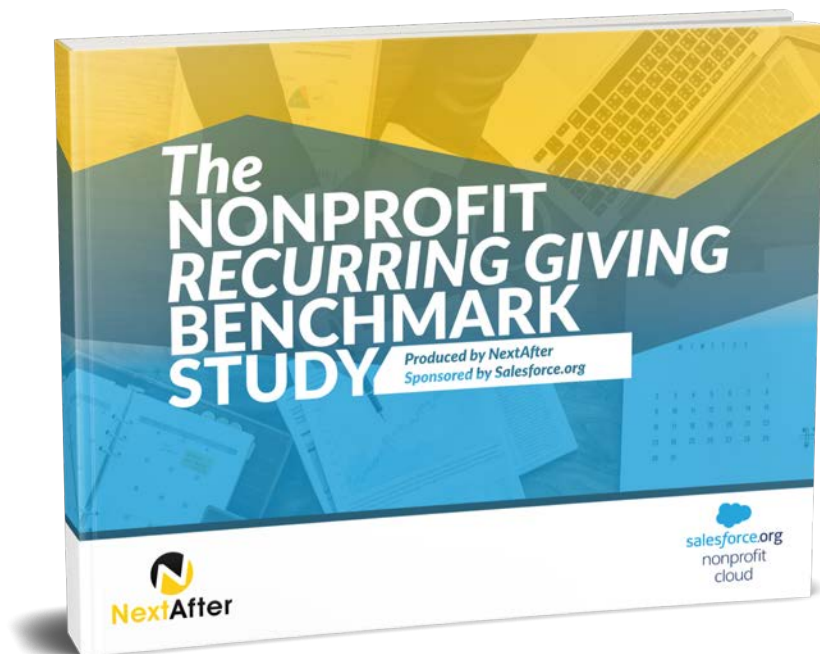
1. Try having a longer-term communications plan specific to recurring donors (not just immediately after).
2. Try sending a thank you/receipt every month.
3. Try calling and/or texting your donors.
  - a) Try making phone number optional on donations (if you're going to actually use it).
4. Try making your emails (including customer service) look, sound, and feel more personal.
  - a) Try sending from a person, not an organization
  - b) Try using 'you' and their name
5. Try using tools, technology, and companies that auto-update credit cards.
6. Try having a response plan for when cards are lost (and not auto-updated).

# DIVE DEEPER.



Get The Nonprofit Recurring Giving Benchmark Study today at [nextafter.com/recurring](https://nextafter.com/recurring)





Get The Nonprofit Recurring Giving Benchmark Study today at [nextafter.com/recurring](https://nextafter.com/recurring)

### Get more research on things like:

- Gift arrays
- Premiums
- Communication analysis by verticals
- Month by month communications per donor type

### Get even more ideas to :

- Make recurring giving easier
- Help donors find where to give
- Improve your donation forms
- Improve channel communications
- Improve donor cultivation
- Improve donor communication strategies
- Get better inbox placement
- Improve your appeals and thank-you communication
- Win back more lapsed credit cards

# QUESTIONS?

