Moving Up or Moving Out: A Relationship-Centric Approach to Portfolio Management and Handoffs

ravvtv





Presented by:

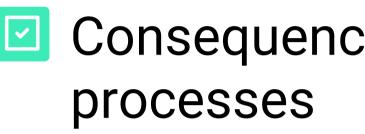


Frank Mumford, CFRE



Today's Agenda













Consequences of ineffective internal

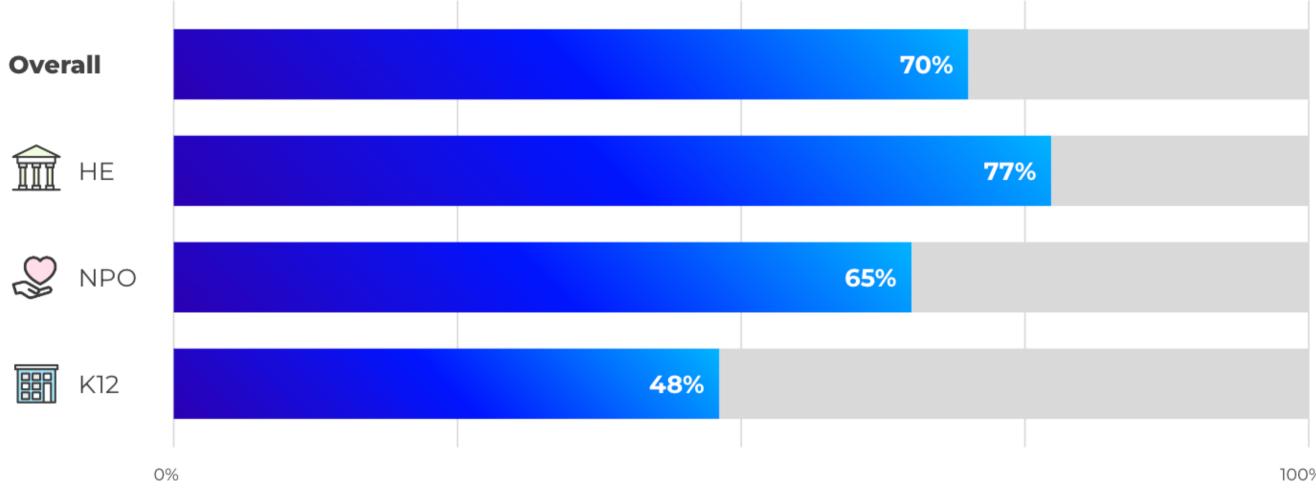
Best practices for internal handoffs

Ensuring relationship continuity

Key Findings

Pipeline building continues to be a top priority among institutions. From move donors through the process to retaining donors, pipeline growth should be a main goal for every organization.

Donor pipeline building is a top priority

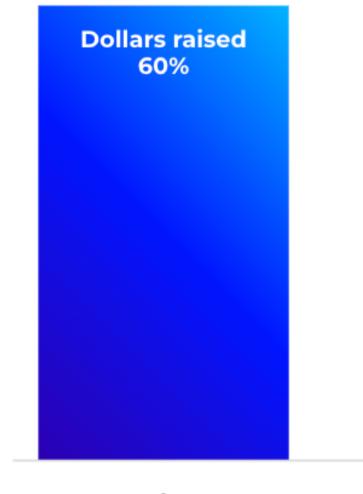


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100%

Top KPIs

DOLLARS RAISED DONORS RETENTION ** UPGRADE OF DONORS QUALIFY FOR MAJOR GIFTS ENGAGEMENT LEVEL TOTAL NUMBER OF DONATIONS NUMBER OF CONTACTS PER YEAR NUMBER OF VISITS PER YEAR





HE



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Dollars raised 59%

Dollars raised/ Donor retention 33%



NPO



K12

Currently, what's your biggest pain point?

DONOR VISITS

BOARD OR ADMINISTRATION ENGAGEMENT FINDING NEW DONORS **PERSONALIZED DONOR ENGAGEMENT**ANNUAL GIVING CAMPAIGNS LACK OF STAFFING **RESOURCES / TURNOVER** BUILDING THE MID-LEVEL PIPELINE ACCESS TO DONOR DATA OR BEHAVIOR ACQUIRING MAJOR GIFT DONORS DONOR STEWARDSHIP

DONOR RETENTION

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Consequences

Without internal processes, there are consequences which will hurt the organization in the long run.

Engagement







Satisfaction





Missed Opportunities for Donor

- Reduced Team Morale and Productivity
- Fragmented Donor Experience
- Decreased Donor Retention and

Loss of Institutional Knowledge



Best practices blog

Navigating donor transitions between gift officer portfolios is more than a strategic task. It's about nurturing and sustaining relationships built on trust and shared values.



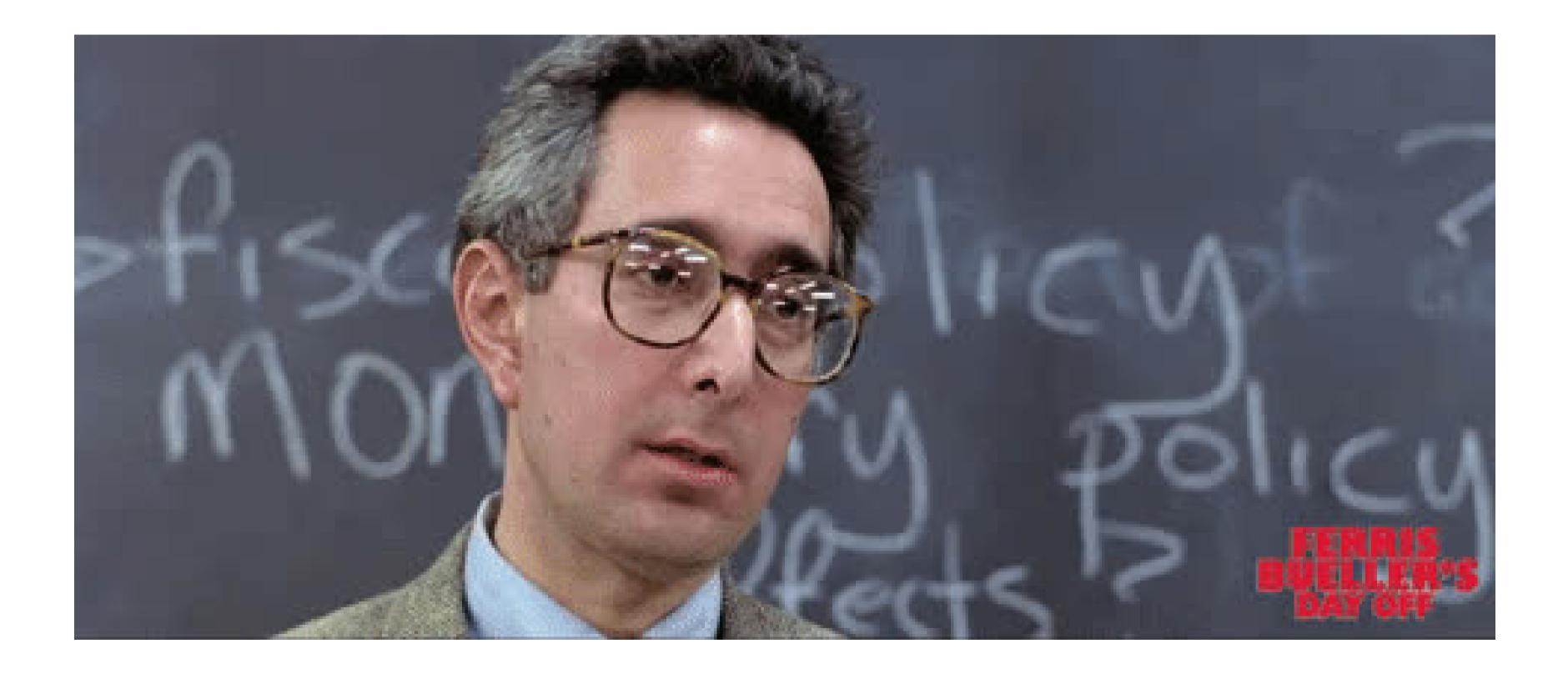
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WHO LIKES LOGGING ACTIONS?





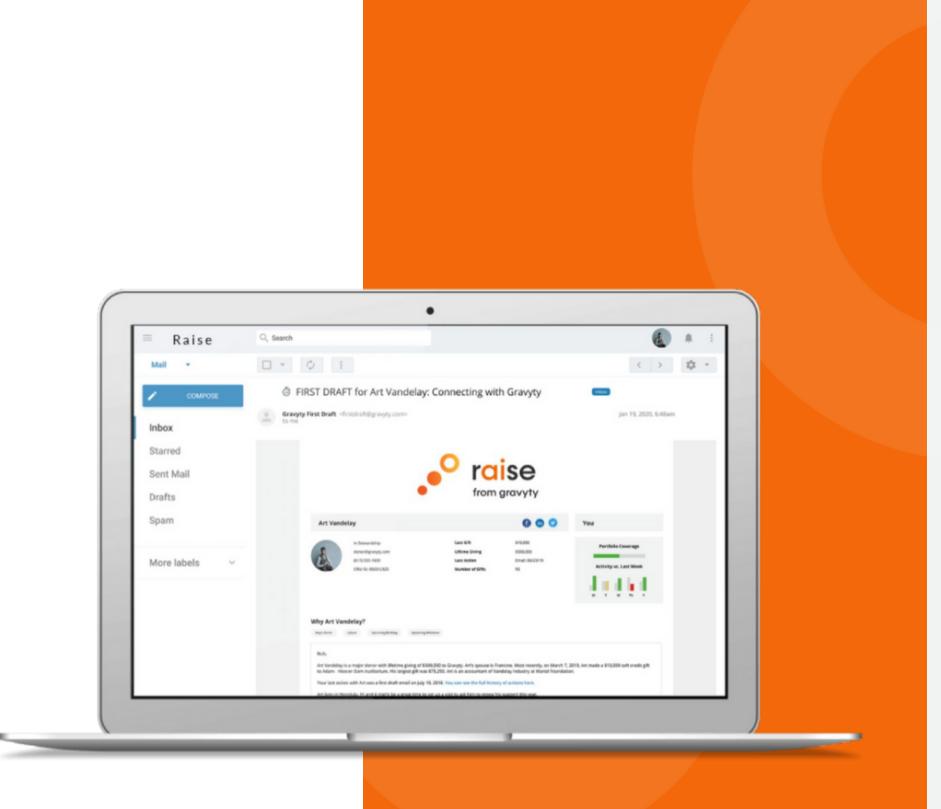




What is Raise?

Al-powered fundraising

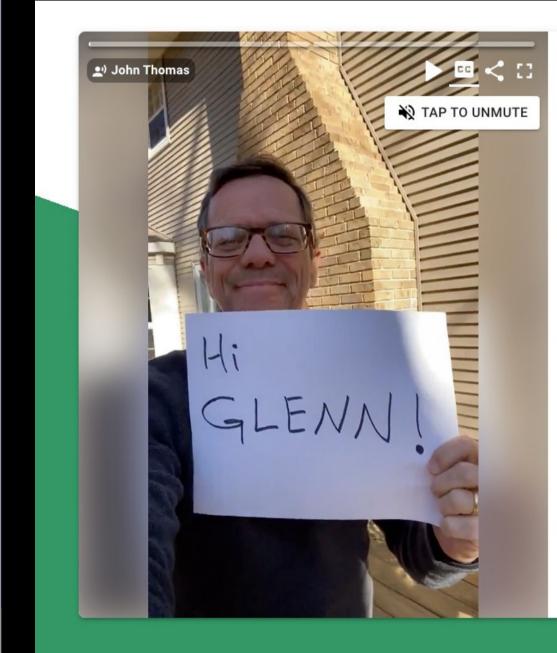
- Strategic + Targeted outreach Personalize donor communications
- → Intelligent travel planning
- → Move donors through pipeline
- Improve plan execution
- → Automate record keeping
- → Boost fundraiser capacity with increased efficiency





Gratavid

Bring human connection to a digital world.





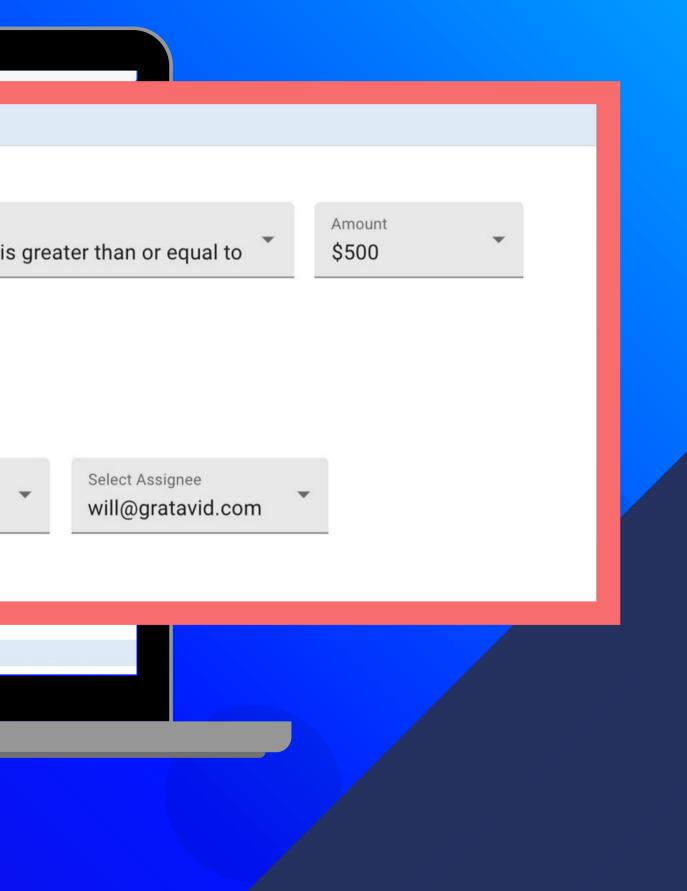
Arkansas 4-H Foundation

Thank you, Glenn! We appreciate all you do for Arkansa Foundation and the youth we support.

Write a private reply...

Gratavid + Bloomerang

	1	Account						
9	Ì	Bloomerang Integration				=	Rule: 1	
st			Connected. <u>Disconnect</u>					
/s		New Donation Added In B' Amerang Create a task or send an ite when a new donation is added in Ble Status ON: Runs one for hour. Next run is in 27 minutes					IF	Select Condition The gift amount is
s.		1	When a conation is added in Bloomerang = Rule: 1					+ Add Condition
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		Ŧ		+ Add Condition $\checkmark \checkmark \checkmark \checkmark$				• • •
			THEN	Select Action Create Task	Select Assignee will@gratavid.com		THEN	Select Action Create Task
-			+ Add Rule					
			else if none of t	the above rules are true	then			
			Default Rule					



Other tool ideas









Relationship Continuity

Relationship continuity is vital in fundraising as it fosters trust, loyalty, and a deeper understanding between donors and organizations. Sustained relationships provide stability, consistent support, and the opportunity for donors to witness the impact of their contributions, ultimately leading to increased donor retention and long-term financial sustainability for the organization.

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Source: Advancement Resources



Build Trust-based Relationship



Locate/Confirm Philanthropic Passions



Q & A



Next Steps





Evaluate current processes

Identify easy wins



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Schedule a pipeline assessment

Send me a sample





Thank you.

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Audience poll question

Would you like to see Gravyty's donor pipeline platform in action?

