

WEBVTT

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And a plans in a picture.

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Today's session.

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Is called, Giving USA 2024: The Future of Philanthropy.

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Before we get started. I want to tell you a little bit about Alford Group.

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And go through some webinar logistics.

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So many of you are very familiar with Alford Group, and who we are and what we do. But for anybody who may not be.

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Alford Group is a national service consultancy.

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Serving the nonprofit community.

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We have six

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Flagship services that are all listed here on your screen.

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And we are a member of AFP, The Association of Fundraising Professionals.

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A certified Women's Business.

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A proud member and a sponsor of the Giving Institute.

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And our President and CEO Brenda is currently the chair of the Giving Institute.

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Which houses the Giving USA foundation that puts out this report. So we're happy to bring.

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This report to you.

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And if you want more information about Alford Group, you can check out our website, which is in the bottom left hand corner, which is Alford.com.

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I wanna take just a moment.

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To acknowledge the land on which we reside. All of you are calling in and participating from all over the country. But I'm going to acknowledge Chicago, Illinois. That's where I'm currently sitting, and that is also the headquarters of Alford Group.

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Chicago is located on the traditional unceded homelands of the Council of the 3 Fires, the Ojibwe, Ottawa, and Potawatomi nations.

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Many other tribes, such as the Miami, Ho-Chunk, Meskwaki, also called this area home.

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The region has long been a center for indigenous people to gather trade and maintain ties.

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A few webinar logistics.

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This is being recorded.

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This is going to be a 90 min webinar, and you'll receive an email within 24 h. That will give you a link to that recording.

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I also wanna let you know this is approved for one CFRE credit. So for anybody who is.

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Seeking certification or recertification. Please know this will count towards your credential.

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After we conclude today you'll be prompted to complete a very short survey. It's very short. We really appreciate your feedback. It's about 4 questions. So please consider taking that.

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Everyone today is in listen. Only mode for the duration of the webinar.

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However, the chat is open, so we encourage you all to use the chat.

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If you want to. Right now, pop in who you are, where you're from. Say, hello! That would be wonderful, and we'll have a dialogue throughout the chat throughout the Webinar today.

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However, to ask a question. We ask that you use the QA feature which is a separate.

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Icon on your navigation bar, and it works the same way. It'll open a window, and you can type in your question.

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And that way we can better monitor all of the questions throughout the webinar, and we'll answer as many as we can at the end of the QA.

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So with that. I wanna turn things over to our moderator today.

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Who is Brenda Asare, President of Alford Group.

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And also, as I mentioned, the current chair of the Giving Institute.

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And Brenda will go over the agenda for today, and kick us off.

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Hello, and thank you so much.

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Welcome everyone. It's so great to be back together again and thank you for joining us today.

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Brenda Asare, president of Alford Group. My pronouns are she hers. I'm an African American woman, wearing black rimmed glasses with my hair pulled back. My background is an off-white wall and a black bookcase.

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I come to you from the homeland of the Potawatomi people here in Chicago.

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We are just thrilled to have you with us for what promises to be an engaging and transformative discussion.

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Oh, philanthropic giving in the United States.

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Today's webinar will shine a spotlight.

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On the pivotal role.

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Development. Professionals play in cultivating and driving impactful change.

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Philanthropy is more than a financial transaction.

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It's a powerful force for good.

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Capable of transforming lives and strengthening communities.

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At the heart of this mission are the dedicated professionals and executives.

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Who bring their expertise.

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Creativity and passion.

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To the forefront of this important work.

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You will hear from some of these talented professionals today.

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Together.

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We will explore the current landscape of philanthropy.

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Uncovering, emerging trends.

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Key challenges and untapped opportunities.

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That are shaping the future of charitable giving.

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We will also discuss how development professionals can craft.

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Compelling stories.

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Build meaningful donor relationships.

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And strategically channel resources.

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To advance impactful causes.

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Our aim today is to equip you with actionable insights and strategies.

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That will enhance your ability to inspire generosity and drive positive change.

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We believe that by leveraging the collective wisdom and experiences share it in this session.

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We hope to empower you.

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To elevate your efforts and contribute to a thriving culture of philanthropy.

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Thank you again for being here.

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And for your commitment to making a difference.

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Let's dive into today's discussion and explore.

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How we can together amplify our impact.

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And foster a more generous.

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And compassionate world.

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I am so honored to turn it over to my esteemed colleagues, cook.

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And Sharon tickets to kick us off. See you in a little bit. Thank you.

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Thank you so much. Hello, everybody. My name is Alexis Cooke. I use she her pronouns, and I am Alford Group's chief operating officer, joining you today from Santa Monica, California.

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The ancestral, unseated territory of the Tongva peoples.

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I am a white woman with shoulder length, blonde hair. I am wearing a dark blouse today with a pinked necklace.

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And Hello! I'm Sharon Tiknis. I use she/her pronouns. I am the chief client experience officer at Alford Group, and I'm joining you from my home office in Prescott, Arizona, the ancestral home of the Yavapai people. I'm a white woman with short brown hair, wearing a green dress and a white jacket. And I'm excited to jump in the U.S.A. Today. U.S.A. Today. There you go the giving U.S.A. data. Here we go.

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As Lucinda indicated, we'll be reviewing the giving U.S.A. report which covers philanthropic trends with new data on total giving in 2023. It's a big data project, and it's the oldest and most comprehensive report on charitable giving in the United States.

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It's published by the Giving U.S.A. foundation we just loosened, noted as part of the Giving Institute, comprised of national firms, such as Alford Group.

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The report is researched and written by the Indiana University School, Lily's Family School of Philanthropy, and appropriately, it's made possible by contributions from Giving Institute member firms like Alford Group, who's been a member of the Giving Institute for over 40 years and has been a significant donor to this important research.

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And as Brenda I I as Lucinda noted, we are so proud that Brenda serves as the chair of the Giving Institute Board.

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Alexis.

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That's right, Sharon, and we know how important this data will be for you and your fundraising. So as a friend of Alfred Group's, we're delighted to extend a 30%. Discount on your order of the report. So please send us an email, at info@alpha.com to receive your discount.

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Now on behalf of our Alford Group. Sharon and I are here to share with you the takeaways from the recently released, giving us a data, as you know, for the year 2023. In addition to the.

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Data informed takeaways, we have 3 calls to action to energize and elevate your fundraising programs.

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As you may have heard, and we will review in a moment. Individual giving is decreasing slightly year over year. But we feel that focusing on this decline may be emphasizing the wrong takeaway. We hope you are hearing that relationships remain key to a successful fundraising program and building relationships truly, is more important than ever.

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This is especially true when we see how individuals were represented across the quests, foundations, and donor advised funds.

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Not to mention the many additional ways individuals lean in and support their community, and there were positive economic factors that contributed to very high corporate performance.

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Which should point us all back towards relationships. So let's jump into what this could

mean for you. And let's talk about 3 tangible calls to action. So first, Alford Group encourages you to embrace community informational impact and strategy.

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And donor centric fundraising.

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Secondly, get out there and intentionally build inclusive strategies for the long journey, targeting, ultimate transformational gifts in your solicitations from all sources of giving. And finally, let's be bold and make those asks.

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So let's get to the data. Here was the big headline.

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Thanks to better than expected economic performance in 23, giving reached 557.16 billion dollars last year.

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Though this is a notable increase.

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And a new high giving did not outpace inflation.

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So giving U.S.A. data is reported in current dollars and inflation adjusted dollars.

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Please know that for our presentations we will share inflation data in order to provide the most accurate year-to-year depiction based on the value of the dollar.

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Now, as you can see on our next table, giving has declined 11 times since 1,983.

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The average annualized rate of change in total giving and inflation adjusted.

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83, this 2.7%.

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Making the inflation adjusted. Rates of change between 2,022 and 23 lower than average.

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However, we want to focus on the fact that the trend in the past 10 years is up for the most recent decade from 2,014 to 23. The total growth in inflation adjusted giving is 21.8%.

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And as an interesting additional data point to keep in mind from the giving U.S.A. 24 report.

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The Irs reported number of charitable organizations amounted to 1.48 million in 22, and this was a 3.4 increase over 2,021.

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We all know that giving goes up when the economy performs well, and our confidence increases, and in 23 disposable personal income, the S. And P. 500, and the Gdp. All performed well and better than forecasted.

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Disposable personal income is tied to total household income, which is a key determinant of how much households feel they can give. And we saw Dpi increase 3.8% in 2023.

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Growth and declines of the S. And p. 500 has tracked historically with giving, and the S. And P. 500 increased 19.3% in inflation adjusted dollars between 22 and 23.

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Similarly gross domestic product, Gdp, which is the market value of all goods and services produced as one of the most important factors considered in measuring a nation's economic health.

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Giving us a percentage of Gdp was 2% for reference. The all-time high was 2.3% in 21.

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And you may recall that inflation reached an all-time high of 8% in 2022. However, we did see inflation drop to 4.1% in 23.

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We wanted to share with you that as of July 11th this year, the annual inflation rate was 3% for the 12 month period. So we're moving in the right direction.

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So we just wanted to pause for a moment before we look at overall giving by source.

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And do a quick poll. So would you please share with us? Where did you or your organization see the highest increase in the sources of giving.

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So excited to see this.

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Was that individuals, corporations, or requests where you saw the highest increase or spike in giving.

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While everyone's completing the poll. I just want to acknowledge that we are speaking very quickly, and yes, we can absolutely slow down. And I appreciate the reminder. I am very guilty of speaking too quickly.

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I know we were laughing that.

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I. I speak twice as slow as you do.

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And you're still pretty fast.

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I'm ready. There you go alright. So speaking of fast things, how to giving what were your sources of giving? We're excited to see the results.

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Oh! Here we go!

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This is Lucinda. We might have a glitch in the poll.

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Cause we didn't get a lot of responses. So if anybody wants who didn't have a chance to respond in the poll, if you want to put in the chat, please feel free.

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Oh, perfect! Thanks, Lucinda!

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Okay, got it?

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That's great!

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Well, no doubt.

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Every one of these sources of giving for some organizations had had a spike, and you know that's part of what we are eager to sort out as we look at sources of giving. You know, giving is dynamic and differs from one organization to another. It's always interesting to see how strong economic.

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Factors influence levels of giving by source and in a very dynamic way. So let's break down. Starting with corporations. Corporation giving was 7% of total giving, actually a 1% decrease in 23. However, please note, corporations are the fastest growing, giving source with a 5 year average growth.

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Rate at 14.3. So we're gonna come back to corporations and look at how companies are really shifting their giving strategies and the vehicles that they're using to partner with nonprofit organizations. So we'll come back to this and our takeaways and call to action.

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When we look at giving by individuals and households this 67% of total giving, and of course, represents the majority of the giving landscape.

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Very large Mega gifts get a lot of media attention, and it's wonderful to see how transformational many of these gifts have been. For instance, from Mackenzie, Scott, and more recently from Melinda Gates, make a gifts are defined. It gives 500 million, and above, and they totalled 8.0 7 billion in 23. That's only 1.4 5% of individual giving.

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So while we think of Mega gifts as being substantial, it's a slice. It's 1.4 5 of the pie, but we do want to pay attention to this trend because we're down compared to the pandemic years, but larger than they have were before the pandemic. So it looks like we do have a trend in high net worth individuals giving large gifts during their lifetime.

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Yeah, we all know that annual giving is built on gifts of all sizes, and we will share thoughts on strengthening your donor base and our key takeaways.

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So let's look next at giving by bequest, which resulted in 8% of total giving in 23 and remained relatively flat.

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We want to point out 2 important things with assets valued below 10 million represent of all bequests.

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Smaller states.

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Giving by foundations which includes grants made by independent community and operating. So again, it's the ecosystem of foundations. Amounted to 19% of all gifts made in 23, and reached its second highest year on record.

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So when we look at all the data, which is a lot of data, we want to point out that the most important point is that giving by individuals actually totaled 18.5. When you add together the many ways that individuals giving us counted from individual gifts to bequest to half of

all foundation, giving.

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Individuals giving is holding steady, particularly in a strong economic environment.

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So, just taking a quick look at the trends. Over 3 years.

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Total cherry total chair charitable, giving declined by 8.4 between 21 and 22, and declined again by 2.1% and 22 and 23. Again, we're looking at adjusted and adjusted for inflation dollars, because we think this helps to see the trend more clearly. And when we look over the course of 3 years from 21 to 23.

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It's a 10.3% decline in inflation adjusted dollars.

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Remembering that the pandemic had a very high level of 20 in 2020 and you can see here in the far right column that individual and giving, fell significantly in the past 3 years, while foundation giving grew.

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These declines are again reflective of that 20 spike. And we want to keep this in mind when we come back to talking about making bold asks.

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So let's jump ahead and look at what each of the nonprofit sectors experienced, how they experience giving and how giving or didn't and current dollar in in inflation adjusted dollars for all 9 major recipients. You see that it grew for all subsectors except for 2 international affairs and religion.

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Let's look at some of the notable changes in giving to religion has been declining as a share of giving over several years.

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Yeah, we wanna call to call some interesting information that was reported in 2023 by gift lifely and the Lake Institute on faith and giving who reported that 43% of surveyed faith leaders reported they had increase in giving.

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36% of reported, they stayed consistent, and 20% reported a decline in giving to their place of worship.

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So there's a lot of attention to giving to remind everyone that.

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Part of this shift is that while there are faith based organizations. In other sectors, it's not reported and giving to religion. So giving to religion is places of worship, whereas, for instance, school, or a hospital, or a human service organization that's affiliated with a religious institution is.

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Is counted in that subsector.

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We also wanna take a look at where there's been a rebound in sub sectors associated with wealthy donors, such as education and arts and culture, who posted a strong 2 year growth, even when adjusted for inflation.

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And contributions to human service. Sector comprise 14 of all donations.

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And increased 1.7. According to the benchmarks, 24. Report by M. And R. Online revenue for hunger and poverty, relief organizations.

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Giving decrease by 4% and 23. The 3rd consecutive year of decline.

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Remembering, though, that these declines came after a 465% increase in 20 in response to the pandemic and ensuing economic uncertainty. While that spike was great, we realized that that level of giving is not sustainable and is not likely. Without that kind of really critical situation.

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So finally, we just wanna highlight here that giving to foundation has declined between 21 and 22 and declined again between 22 and 23 and that cumulative change is minus 21. However, donors continue to support Grant making organizations. Aka foundations at very high levels, and, as we reported, giving from foundations.

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And giving 2 foundations to be a really critical part of the ecosystem.

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So let's jump back to polls again and see if we can gather your input. Everyone grab your mouse or your touch pad and tell us, how was fundraising for your organization in 23? Did you raise more money than 22, less money than 22, or raise about the same.

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So, Alexis, I know with our clients we're seeing a lot of I I think, Tom, do you have your hand up? Do you need to jump in here.

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Or maybe I'm just misreading what's happening on the screen.

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Okay.

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Well in I'm assuming I'm hopeful that the poll is working for everybody, but if it's not, please feel free to use the chat as well, and thank you for your patience. We're hopeful that you are all able to to see the slide on our on our presentation view. So let us know. Did your organization raise more money than 2022? 0, congratulations! I see a couple of responses. They're very positive.

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Were you? Did you race about the same? Or did you raise less than 2022.

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Raise more is what we're seeing mostly here.

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Great.

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Well, good.

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Unfortunately, the poll doesn't seem to be working, so I think the chats is the better option.

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Okay, got it?

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Thanks for that, Lucinda.

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And thanks again. Everybody appreciate the participation in the chat.

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Oh, somebody had far less. That's a.

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Hard here to rebound from. But that's what we're here to talk about, how to think about growing and.

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We have.

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Responses, that all.

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In all 3 categories. So we know that that's the reality of fundraising the dynamic factors that impact

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How we can manage our work.

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Well, that takes us to a really.

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Hopeful place to offer you our calls to action. We want you to find energy in the data and bring you our takeaways in the in the frame of these 3 calls to action and start with the importance of being both.

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Community informed, and donor centric to strengthen your fundraising efforts.

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Alford Group believes deeply in the power of community-centric fundraising.

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We're seeing our clients continue to work in the wake of the COVID-19 pandemic and systemic, racial and social justice.

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Our most successful client fundraising teams are blending community with organizational impact and donor centric fundraising.

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Many clients reaffirm their strategic priorities or are actively working within new strategic plans.

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Created during or following the the.

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20 to 22 disruptions. We see that these clients who sought inclusive planning process, who prioritized community listening tours and who created multiyear strategic plans found that they're founded on their community's needs and larger vision, for the community are experiencing more successful and aligning more successfully with community.

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With their community really connecting their community, impact to their donors and tensions and energizing and educating their donors to join the organization and its mission fulfillment. Impact journey.

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These organizations are not radically overturning relationship building practices which we believe strongly in. They are simply embracing impact stories, key metrics, validating donor intent.

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Taking intelligence and other community work to share with their donors and engage them in that work in a really dynamic way. They're taking the time to educate and connect their donors to community informed priorities, centering the needs of the community and the impact the organization is having, together with their community.

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Which leads us to our next call to action.

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That's right. Well, you know. For a long time the giving benchmark followed an 80 rule.

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In that 20.

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80% of your donor pool comes from 20 of your donor base. And now what we're seeing across our clients is that it's much closer to 90 10. And this is creating tension and an over reliance on the same 10% of donors to sustain annual fundraising goals with major or transformational gifts and.

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As Sharon noted, we believe it's possible to meet a donor where they are. If your fundraising is rooted in community informed programs and impact, and it feels.

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Good to do that.

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And so we wanna share, we see some extremely positive shifts as nonprofits more and more recognize that transformational giving means something different to each of us, and that might that might mean a. It's a lead gift for a major capital campaign. Or maybe it was a modest plan to gift commitment or maybe it was a stretch, but increased annual gift to \$5,000.

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Yep. The point is that any donor at any gift level may make what they define as an ultimate or transformational gift in relation to their capacity.

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And by shifting this narrative within our fundraising practices, we're inviting a far larger pool of donors to the table to learn about and support our work, and we're reducing some of that tension on our donor pipeline.

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One key piece here is that our definition of donor is changing and we're redefining generosity. And what generosity means within our community, within our communities and within our organization.

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We at Alford Group are encouraging nonprofits to embrace this, and in their fundraising.

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Building relationships with your midlevelers, embracing a woman's role and making philanthropic decisions, expanding opportunities to support.

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As a volunteer leader, and what those.

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Expanding the definitions of what those opportunities are for your volunteer leaders.

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Seeking, repeat, giving behaviors and strengthening retention. All of this is more important than ever. So

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Just want to take a moment. I know, Sharon, you'll join me in this. We wanna emphasize a few key data points specifically related to women in philanthropy.

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Women give reports issued in 2015 and 2022 recognize that historically, women have led civil rights movements and philanthropic efforts, including our current racial equity and justice movement, and these reports.

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Found that women are 40% more likely to give than men.

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Women volunteer more than men at almost twice the rate of their male counterparts.

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Women are more likely to spread out their giving to more causes.

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And high net worth. Female donors are more likely than male donors to give when they believe the contribution will make a difference when they know the organization allocates gifts effectively, and when they want to give back to their community.

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So redefining leadership strategies that embrace women is really important.

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You can redefine.

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Roles, ensuring that you're positioning women as chairs of the board, and chairs of major fundraising or programmatic initiatives and campaigns.

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We can embrace the value of engaging the whole household in conversations about their giving and their philanthropic impact, as well.

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We also want to be sure, we're building fundraising asks and engagement strategies that are inclusive of all giving levels. Again, emphasizing the the larger community, and your larger donor pipeline.

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Continue to qualify your portfolios and prioritize relationship building activities across all giving levels and vehicles and and a tool we like to promote is to ensure that you're mapping out those 6 to 24 month action plans.

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And allowing room for them to evolve across each donors and prospects within portfolios.

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But also consider bundling, giving, and inviting donors and prospects to discuss a holistic annual commitment.

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Another trendline Alford Group is seeing is that communities want to be back together, and we are prioritizing in person opportunities. So please be sure you're advocating for investments in cultivation and stewardship strategies.

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We want to work. We want to work alongside and build up from transactional fundraising practices which we know were critical and for many successful at the height of the COVID-19 pandemic response, and our social and racial injustice response.

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But now we want to seek.

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A balance and ensure. We have reinvestments in the stewardship programs that create opportunities for your community of supporters and community members to come together with smaller and more intimate events and larger gatherings that build presence.

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We encourage our partners to be part of the larger community as well, and attend others. Hosted events around town.

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So intentionally curating your donor journeys with a focus on inclusion and stewardship, will build trust deep in partnership, and ultimately create the space to ask for that transformational gift from a much larger community of supporters.

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Well, let's move on to our final call to action, which you've heard us in many different moments. In this data readout. Be bold, and make those asks. Let's start going back to corporations.

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Reminding you that the fastest growing source is corporations, and that they're shifting their giving strategies and vehicles. So listen, corporations have more profit. Let's get in there. Be bold and make the asks.

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In addition to direct gifts and sponsorships, there's new emphasis on corporate matching gifts. They're giving more volunteer hours for their employees to join in your work. They're providing in kind support, both in actualities as well as in their expertise.

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Each of these represent a commitment to impact driven models and investments that are aligned with the Company's purpose.

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And to that point we can also seek opportunities with corporate partners to align with their employee resource groups or erg, which is typically employee led and allows employees to support each other's.

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Personal and professional pursuits.

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We can also seek funds through corporate business resource groups. Brgs.

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Who are aligning aligning employee groups specifically with bottom line business goals. So that's another question to ask when you're developing relationships with your corporate partners? Is there a way for us to align and support your initiatives with your er g's, and.

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In bringing funding and support and resources to our shared commitment to strengthening our community.

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Again, we want to return to bequests, and as the data shows, we can undervalue the importance of having presence in conversations around plan gifts.

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Bequest represent 8% of total giving. And sometimes we think a plan giving and annual giving are 2 separate tracks. But this isn't the case intergenerationally. If you're not thinking about plan giving, you're at risk of missing, not just a significant piece of the philanthropic pie, but also the opportunity to deepen your relationships with those donors.

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Who have a long time and a deep commitment to your work and your mission.

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You know. Sometimes we feel that we don't know enough about giving to requests, about estate commitments into your donor conversations.

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But here's our headline. It's not that complicated. If you know donors are already here, you're inviting your donors to discuss their philanthropy holistically. Ask them under what circumstances would they, considering their annual support and a contribution restricted for a program, and perhaps think about the deepening their commitment through a planned gift.

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Maintaining that level of giving beyond their lifetime

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It's just it. The research is showing how much younger people start thinking about their estate and their legacy. And let's let our organization be part of their thinking about how they want to be remembered and how they want to bring their family into their philanthropy beyond what they're doing today.

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And we want to just go back to foundations and remind you that they represent 20% of all giving. They've done so much great work to formalize their grant, making priorities and hone their processes. And remember that when a foundation turns down a request, it doesn't mean that that grant is out of that partnership is off the table.

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For the long term. It's still valuable to work on a carefully relationship strategy with the right people and try to break that opportunity open for you to seek more funding from your foundation partners, and those who support the work that is aligned with your mission.

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So in the spirit of the Olympics.

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Go for the gold.

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Be bold and make big? Asks.

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We hope this has been helpful to you, and we want

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As we tie for the channel for the panel. We want to invite you to note in the chat which of these call to actions. Will you activate following today's webinar.

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We're excited to hear.

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So with that, Brenda back to you.

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Well, thank you, Alexis, and you all left us with a number of.

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Wonderful touch points that I know. Our panel.

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Is, is going to expand on even further, as we think about the the 90 10 rule, the importance of everyday donors.

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The important role that women.

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Continue to play in philanthropy.

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I like to now turn our attention to our.

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Very talented team of professionals, who will be joining us for the next part of our conversation together.

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I am so honored to be in partnership with.

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These wonderful development professionals. I've known all of them for many, many years, and I just want to say, Thank you.

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Marco Corona Development Director at the Southern Environmental Law Center.

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Jennifer Lackey, Chief Development Officer, with the Food Bank of the Rockies.

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Tycely Williams, chief executive officer of the Liberty Fellowship.

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And you're gonna be hearing more from them in just a second.

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We do have another poll question again, please. I understand that Poll is not working. Please put it in chat.

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Just based on what we heard, and I heard and saw from the chat earlier, in terms of Did you raise more or less, or the same in 23. It looked as if.

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Most of you experience more money in 2023.

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And so how optimistic are you about the future of philanthropy? Are you extremely optimistic?

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Somewhat pessimistic or very pessimistic.

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So again, let's see what everyone is thinking here in terms of how are you feeling about the future of philanthropy? And what's happening now?

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It looks as if we have a really great mix, I see, cautiously optimistic.

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So there's a lot going on right now, and we're gonna now turn our attention to our panel.

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So on the heel of the last 2 years of record breaking first, st starting with Covid.

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We know that giving has declined.

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But we have had more dollars coming into philanthropies. I do not want us to discount that, and we want to celebrate that.

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So, Marco Jennifer Tycely, as you think about the future of philanthropy.

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And reflect on the data story that Sharon and Alexis share it with us.

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Please let's share upon your backgrounds.

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And share what stands out to you as a call to action.

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From this latest report.

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So, Jennifer, would you please kick us off.

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Sure I'd be happy to. Hi everyone. Jennifer, lackey, chief officer. I am here in Denver, Colorado, which is the ancestral homelands of the Cheyenne and Graf nations.

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And I am a middle aged white woman, with shoulder, length, hair.

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So to answer your question, Brenda. I've been in a unique position. I started here at Food Bank, the Rockies in 2020.

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And for those of you who have a good memory was January 2020, and we all know what happened in March of 20.

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And so it's been a really wild ride philanthropically for any of us who have been in fundraising for any length of time these last 4 years have felt really unprecedented.

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And so, more and more. I've really relied upon benchmarking and upon data from sources like giving U.S.A. as well as from sources like my peers and other food banks.

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And what's that's really enabled me to do is to determine.

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What might be coming down the pike. What considerations might I need to make when I'm budgeting for revenue?

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When I'm looking at what

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Pieces of the pie, so to speak, may be growing. Where am I investing my resources, and where am I investing my staff resources.

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And so I really use this data to set priority. And what I'm really focused on is the individual giving piece of the pie.

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Here at the bank of the Rockies we have a traditional direct mail program where a lot of our donors have come from. They are a donor segment that is now aging, and they are the perfect donor group to be talking to about Ira charitable Rollovers. We just learned a lot about the stock market and some of the beginning slides. So things like gift of appreciated stock. And then, of course, having those brave discussions around playing gifts as well.

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So that's been my area of focus. And where my call to action will be focused as well.

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Thank you so much. What are you seeing? And what are you currently doing? In response to this data?

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So, Brenda, I want to thank you and your incredible team. For your decades of commitment to inclusive relationship building strategy, development.

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And frontline fundraising.

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Thank you.

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Hi.

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Brenda, you know I.

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Should properly introduce myself. So again I am Tycely Williams. My pronouns are she her.

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I am the newly named chief executive officer for Liberty, fellowship.

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I am zooming in.

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From the indigenous land of the Chicora, which is right outside of Charleston, South Carolina.

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I am an African-american who is middle age, but young at heart.

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And I am rocking big navy blue glasses today largely because, like you, Brenda, I am rooted in an extreme.

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Stage of optimism. I am most excited about the growth connected to our corporate partners.

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At the end of the day. I have always found value from our corporate partners.

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Largely because they understand.

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Prof.

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They understand.

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Purpose.

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And they understand the importance of connecting with people.

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I also think, in particular, year over year, I turn to giving U.S.A. to remind me.

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That, in addition to my corporate partners and my corporate relationships.

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I have to make sure I'm looking at all the various segments of where and how the revenue comes in when we look at contributed income.

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And to make sure, Brenda, that I'm working with trusted advisors to crunch my own numbers for my organization.

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So what's great about giving U.S.A. is? It gives us.

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Yes.

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The macro view. But what's wonderful about the inspiration and tactics that you and Alexis and Sharon have shared? We now how to? We know how to go back to look at our own data, to determine do we have lapsed relationships that we need to focus on? Do we have strategies in place to adequately move people from current state to a more meaningful.

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Increase state of investment. Are we also thinking about new donor acquisition, as well as those cybuns and live months which we know a lot about in this field.

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Some years donors, and not this year's last year's donors, and not this year's.

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And Brenda. Before I turn things over I will just remind everyone.

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I am also inspired by the wonderful wisdom of Elizabeth Dole, who, when I was at the Red Cross, would say.

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Yeah.

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Everybody is a fundraiser, no matter where you sit. If you work within a charitable organization.

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You are a fundraiser, and so I just wanna encourage folks whether you're sitting in.

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The CEO seat, the Chief Development Officer Seat programmatic seat.

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Everybody has the wonderful opportunity.

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To invite people to invest in our meaningful missions.

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Yeah, thank you, Tycely, so much. And that's a great reminder. Because I, too, spent 15 years of my career.

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With the American Red Cross, and had the opportunity to work with Elizabeth Dole for about 8 of those 15 years. So again, everyone can make a difference right? When we talk about the everyday donor and the important every dollar matters.

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And I like to come back to you, Tycely, to talk a little bit more about the the whole corporate, and and how organizations can better set themselves up for success. But before we go there I like to engage Marco in terms of the data.

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Marco, you have been in a number of you, and I've met when.

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I think you were still at the International Museum was probably before then. So you've been in a number of different sectors.

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Over the past 15 or 20 years that we've known each other. So I you know one of the things that you bring to this conversation, I think, is.

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Really a broad view of how different sectors are performing and relating to philanthropy. So we'll love to hear your thoughts on this data. And how are you now? Using this information to inform your strategy as a development professional.

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Absolutely well, thank you. Brenda.

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And Marco Corona pronouns. He him as Brenda mentioned, I'm the director of individual giving at the Southern Environmental Law Center. I am a middle aged man of Mexican descent. I am bald, with a mustache and goatee, wearing a white shirt and blue blazer, and a background of my office with some pictures on the wall.

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I'm also coming to you from Charleston, South Carolina. So just so happy that Tycely is is my neighbor now? And here, at the ancestral lands of the Chicora people, as Tycely had mentioned, so.

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Jumping into your question. You know. So we see. And I've seen particularly now that I'm with the Southern environment to Law center that.

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Environmental causes are increasing the support that they get. So typically, you see, environmental causes being kind of ranking at the lowest. But what we've seen. And if you dig through the data a little bit more is that it's actually while it's still you know, kind of at the bottom in terms of where philanthropic dollars are going to. It is increasing in terms of the.

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Percentage that is going to environmental causes. And I.

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You know, this is likely, because the impacts of climate change are no longer something we worry about.

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As happening in the future or on the horizon. But the the problems and the impacts of climate change.

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We're having to deal with now. And so even here in the Southern States, where you think there'd be a lot of opposition.

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We are starting to see. While no one likes to talk about climate, we are seeing that there are solutions based approaches that.

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States.

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Like South Carolina, like Alabama, are adopting strategies because we can no longer you know the the impact. So for me. One of the biggest takeaways from the report is the understanding that the more you can connect your work.

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And outcomes to the current and personal experiences of your donors.

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The greater the fundraising results. You have to make it personal to people.

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And additionally, I think the other piece of data that I just want to touch on is is.

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You know.

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In bequest saw the biggest rate of increase about 5% in terms of sources of fund of philanthropy.

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It outpaced the individual and foundation. You know, a foundations by about, you know, 3 percentage points.

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Corporations by about 2 percentage points.

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And I think this rate of increase in bequesting that.

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We are amid the generational wealth transfer. That we had predicted years ago. I recall when I 1st started fundraising being in conferences and folks talking about how you know the baby boomers. There's really.

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Gonna be a time when it's just gonna there's gonna be this generational wealth transfer. And I think we're living through it now. So.

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Not only is this a great time to shore up and make your asks for planned gifts.

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But I think it's also time.

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To start making inroads, introductions, and engaging.

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The younger generations within that family.

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To participate in philanthropy and be just as engaged with your organization as as the as the generation that you're working with. Now.

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You know, that's a great point in terms of engaging the next generation. I know we have a number of wonderful clients.

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In the room today, and I'm not going to call them out, but I know they have already started that work of engaging the next generation, and really looking at how you know.

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Do they align in terms of the future? And what is the legacy that they want to leave.

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Now I'm gonna go back to the conversation around everyday donors, and it was interesting to hear, you know, as it reflects about Mega donors where we had fewer Mega donors. Certainly those who did give more.

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And and again, the continuing trend of where the money is. With individuals, nearly 85% of the donated dollars.

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Coming from individuals.

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So again.

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Our takeaway as professionals is that building individual relationships.

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They're even more important than ever you heard, Alexis.

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Speak on building community of donors. I think that is one of the key opportunities that we have when we think about another call to action is, how do we build community among our donors where they enjoy being with each other? They feel that they, too, are a part of a winning team and and making more possible for the organizations that they care about.

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So as we look at some of these paradigm shifts.

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I like to talk a little bit more about what you are seeing within your own respective development offices and your efforts as it relates to. I'm gonna I'm gonna go back to cultivating mid level donors.

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You know, Jen, you talked about that earlier is one of the things that you activated more intentionally. On the heel of Covid. Could you please expand on what you are doing, and what kind of success are you finding.

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Absolutely. It's been really critical for us to be focusing on mid-level donors as an organization. We'll share a very brief story. That comes back to gosh! Summer of 2020 we started seeing a lot of gifts coming in across the trans. \$1,200 gifts, \$2,400 gifts, and, of course, is any good fundraiser. I wanted to call in make a thank you. Call and then find out. You know what.

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Fared, the skipped, and I heard over and over from people. You know, we received the stimulus check. We're doing okay. We really want to help those who are done.

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And so we saw a huge influx of gifts at this level. And I think, just in general, you see a lot of gifts in the mid level range, which we describe as 1,000 to 10,000.

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And so we really invested in a strategy around those mid-level donors. We hired a mid-level giving officer, which we just call against officer. We don't attach mid level, that title and that individual's fantastic about really developing those authentic relationships. It's picking up the phone. It's sending notes after a gift is made talking about the direct impact that that person is had.

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And really working to build those relationships frequently. Those are people who may have children. So organizing family days is really critical. We'll have those donors come in, they're able to invite their whole family to join them as well for a volunteer opportunity. And similarly we do the same with

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Multigenerational families. We'll see sometimes the grandparents bringing in the grandkids, really focusing on that donor segment has been really important to us.

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Yeah, what kind of results did you achieve, Jen, as you put these in place? You know, we look at retention, which is oftentimes.

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You know one of the hallmarks that we look at as development is great to get donors in the door, but how do we keep them so. Any any thoughts on retention. And what's been your experience with retention of these mid-level donors, as well as major donors.

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Okay.

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Great question. I should share. That part of the strategy we really focused on was to convert some of these folks to sustaining donors so monthly donors. Right now we have 5,000 monthly donors, and those are people who are that could be giving a gift of \$10 a month to giving up to a thousand dollars a month or more. And as we know, we're in this subscription based economy.

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Especially younger folks, are used to their subscriptions, whether it's Netflix or Amazon, or whatever the case may be. So with that donor segment, we're seeing a 90% retention rate, which is absolutely incredible.

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No.

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With mid-level donors and major donors. We've really focused on donor stewardship on keeping in touch with those donors, and I was a little

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Fearful, I guess, is probably the best word to use in the middle of Covid, when we had 50,000 new donors come to us.

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And I just had this sinking feeling that we're gonna just chewing through those donors. They're gonna be one time. And then they're gonna go back to what they previously been supporting. And I'm so grateful, thanks to the amazing team that I have here that that was not the case. So we are seeing with.

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Mid level is about 55% plus. So these are not the sustainers.

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Staying with us and then at the major gift level. It's around 60.

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Which doesn't. We're all in fundraising. We know those numbers don't sound great, but when you compare it to the average of 40.

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Young.

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We're feeling pretty good about those.

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Yeah, those are just very impressive numbers, you know, Jen, I spent the bulk of my career with the American Red Cross. So again, very event driven.

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You know, inflow of donors whenever we had a big disaster, and it was always a challenge on how do we retain those donors? And I think back then we didn't really have the foresight to start thinking about sustainable donors.

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As a a core piece of our business.

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And many times those sustainable are those everyday donors.

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Right. So, Tycely, let's talk about everyday donors. And what are some of the strategies that you have put in place.

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To continue to keep them connected to the mission, and and and connect it to giving to.

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Absolutely well. I, too, want to come in Jennifer on the exceptional work that her and her team are doing.

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You know, I'm gonna introduce Brenda, an experience and current state.

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Which is leading a smaller organization, and also interject some lessons learned.

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And some perspective leading.

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National and multimillion dollar organizations. The good news is, it's oftentimes.

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The same values that underpin to the everyday donor.

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And the transformational donor. So I think, Brenda, one way to set yourself up for success, whether it's you want to get the attention.

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Of that transformational donor who's not accepting Lois, who's not accepting unsolicited proposals, is, be your authentic self.

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Promote your impact.

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Make sure that you have leaned on volunteers to not only give time and treasure, but to also give testimonials.

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It is so persuasive.

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Or an everyday donor for a transformational donor to hear and see your impact.

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From the voice.

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From the perspective, from the story of someone other than you.

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So remember the importance of.

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Demonstrating your impact.

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Not by saying, Hi! We're impactful.

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But actually by introducing the qualitative and the quantitative.

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That not only leads people to discern that you're impactful.

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But also leads people to say yes to your invitation.

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And they're within.

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Brenda, I think, is a reminder.

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I loved the point that was made earlier by your team.

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We've got to think big. We've got to stretch. We've got to push, and we've got to be comfortable with the pause, and we have to invite people to make meaningful investments. Because guess what, friends, we're standing behind some really amazing.

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Roi.

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And again.

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That's the corporate talk. What's the return on investment? You all have many examples that demonstrate.

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How and why you are unique.

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How and why an everyday donor can not only give, but can play an active role in the problem solving. And there Brenda, is where I love working with corporate entities through their employee resource groups, because they are also trying to form and forge community.

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They're trying to form and forge connection. And they're often leveraging shared identities.

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Whether that's racial Lgbtq plus whether that is gender based.

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And so I think it also presents a wonderful opportunity.

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If you are squarely.

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Demonstrating identity based impact.

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To partner with corporate employee resource groups who are also trying to find a way to invest in organizations that align not only with their values.

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But the intended impact is connected to underrepresented individuals and identities.

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Yeah, you know one of the things, Lee, one of the things that that you and you and I have talked about before.

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And that's the importance of how development professionals spend their time.

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And so so number one, the sense of being curious. So could you talk a little bit more about.

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The intentionality of engaging with donors where they are, into some of that work.

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Absolutely, Brenda, and you've been a thought partner, as I thought through on many occasions how best to do this.

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And I will say what's really important.

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Is that you are aligning your strategy.

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And your staff.

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And so when you think through what we're working with.

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Especially in smaller organizations.

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We have to make sure we 1st adopt.

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A plan right? We need a strategy. We need to know.

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What it is we are trying to deliver.

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And we also need to know.

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Yeah.

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The types of donors that we need to prioritize with.

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Yeah.

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And from there, Brenda, we also have to be efficient.

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Effective ethical. But we've got to leverage.

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Other people around us to do and extend the power of our offices.

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So I think, whether it's Jennifer's example or other examples.

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What is the most impactful.

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Is when you can inspire your volunteer leaders.

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When you can inspire your donors, when you can inspire your partners.

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To join with you in inviting more people to invest.

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Yeah.

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So.

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I think, Brenda, it just goes back to not only how you spend your time, but are you spending your time so that.

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One connection.

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Then multiplies.

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And introduces to many connections.

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That's exactly right. That multiplier effect. Thank you so much. Lee.

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Marco. You know we've talked about success relative to engaging.

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Sustaining donors, mid-level donors, the everyday donor really understanding. I'm going to go back to every day just real quick, just really understanding what's driving, a motivating, their giving right really kind of meeting them where they are.

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You started talking about planning and the opportunities that.

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Or before us, as even more, coming out of that particular area of focus would love to know and learn what if you've seen be successful. Many of our clients.

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Don't have a plan giving person staff and ours, you know, wondering how they can activate some kind of plan giving effort, but without the staff. It just feels like it's the cart before the horse. So, therefore, oftentimes nothing is done.

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What have you seen as relates to plan giving that you can share with our colleagues on how they can activate plan giving as a meaningful aspect of their development efforts.

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Yeah, thank you for that question, Brenda. So you know, and like everyone Scic is also trying to increase our, you know, annual mid level and everyday donors.

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You know that said we also have a strong focus on on plan giving, as you had mentioned. So what I would suggest, and something that we've started to dip our toe into and really start to invest in is making sure that all of our development officers are engaged in plan giving.

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So you know, we're starting to train all of our development officers who normally are just working with our mid and major donors to to identify, and then eventually solicit

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Plan gifts. And you know it's our goal that every development officer has within their portfolio some plan giving donors or prospects.

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At the very least, if not soliciting plan gifts, we're at least stewarding so.

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You know. I think a lot of organizations out there. You might already have some planned gifts. I think the first, st you know the 1st question or the 1st step is to identify who they you know who those are, who those donors are, and then record their planned gift and make sure that you're.

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Continuously stewarding that gift. And I. You know this is where you don't necessarily need a dedicated plan gift officer to do that. And you know, I think this is so this is an area that we're we're starting to. We're starting to broach. And we're it's a little bit new school.

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You know, different from the traditional. You have a singular plan giving officer, that is, you know, kind of that is separate from everything else, and designated to pursuing plan gifts.

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We are. Well, we do have that person. We do have a dedicated plan plan giving Development Officer. They also have a small portion of major gift donors, and then our major gift Development officers.

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Have some planned gift officers, so I think you know, we're starting to see some

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Some results from that, just in terms of us being able to identify when we do have a a you know, we're out there.

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Getting coffee with a donor, and we identify that they've been giving to us for years. They love us, and they're at the stage of, you know, stage in their life when they are starting to make their you know, their their plans for you know, for their estate, and we can, you know, ask about. You know our is philanthropy, part of that plan? And if so, you know, who are they considering? And is there anything that we, you know that we can provide them.

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And then the other thing that I'll that I'll mention is that we did

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There are multiple tools out there. We also engage with free will. So we are. Just, I think, after a couple of years of engagement we're at. We just reached a hundred you know, 100 plan gifts.

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And so those are really great opportunities. Where, if you in you, if you have the resources.

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To to contract with a vendor that might have some of the tools that will have some templates that you can use, and then you can. Basically package those for yourself.

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Get them out to your to your constituents, to your prospects, to your donors, and just doing that sometimes, will you know you'll be able to to leverage those tools to to get some early results.

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You know, it's it's interesting. When you talk about new school, where planning is.

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Blended into.

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You know everyone's portfolio. That certainly is a new school approach, because you know.

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When I was doing this more a full time, we had a dedicated individual who's responsibility was to really be thinking about this. So again to have someone on staff who can be a trainer.

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Someone who can partner with.

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Other team members. I think the most important thing, you know, as.

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Our folks in the room are thinking about planning. I think you just need to know enough to know what questions to ask. You don't have to be.

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The ultimate professional on it. I certainly would encourage.

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All of our friends to engage with partners. One of the.

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Findings. I think, from the report was important. The growing important advisors.

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And nonprofit organizations, really seeking them out.

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And getting on their list. I mean. Oftentimes we think that when.

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Individuals are interacting with their professional advisors. They already know the organizations that they want to support. Sometimes they don't.

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And so you wanna make sure that as an organization that you are top of mind. So again, encouraging you to look and engage with professional advisors. So they are aware of who you are. The impact that you're making. So that opportunity arises. They can, you know, make sure you're top of mind.

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You know, one of the things that is not tracked in the U.S.A. giving data.

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Is the generosity of giving, outside of monetary contributions.

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As you all know, this data comes from tax returns. So again, our partner, Indiana Unisool, they have a talented team of researchers plus volunteers from the giving us a foundation. Who review that information, compile it, and they come back to us.

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So again, when we think about

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Everyday people, and how people are approaching philanthropy from a much broader perspective in terms of giving their time.

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Their ties, aid advocacy, talent, and leveraging their networks.

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In support of the public good.

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How should we be approaching philanthropy and thinking about philanthropy?

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As we reflect on the future. We've been calling a philanthropy, and maybe we need to.

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We branded to be more inclusive, so tisly. What are your thoughts on.

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The future of philanthropy, and and how we should track the various ways that individuals are being generous.

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Yeah.

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For that. I really appreciate all that you've introduced into this conversation, and just a few short hours it will be national black philanthropy, month.

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And as a member of the Black community, I take a lot of pride in celebrating.

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The often overlooked philanthropic accomplishments of black.

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Americans and those from the African diaspora around the globe.

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For many of us, I would.

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Assume all of us. Philanthropy is personal.

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It is often tied to.

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A desire to invest in an aspirational world the world that we've yet to see, a problem we've yet to solve.

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And it's often Brenda attach to our lived experiences.

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That which we've seen, that which were proximate to.

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And.

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I think the best way for us.

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To look to the future is to look to the future with the desire to.

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Invent and innovate.

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We've talked about so many practices the way we've done things.

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We've all been doing this work for decades, and not a lot has changed.

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Yeah.

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It is more often an introduction to a system. But the way in which we have conventionally thought about.

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Fundraising.

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It hasn't changed. We need to give ourselves permission to do just what you've said, Brenda. Question is that the right word.

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Yeah.

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Should I be using that word when I speak with certain people? Is it gonna turn them off? Is it gonna.

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Push them to say, oh, well, that's not something I resonate with. That's not me.

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Right.

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I think what is important is that we look to an inclusive future.

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We've gotta be willing to do the work.

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To understand the motivations of our donors.

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To understand how best to connect their motivation.

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To our mission.

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Maybe we punctuate one element of impact to a certain group.

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And another type of impact to a different group.

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And we question whether or not are we really.

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Providing.

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An Roi.

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For all identities to see value in.

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Or have we positioned this to only be about a cause that.

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On!

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African Americans would care about calls that.

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Arab Americans would care about. You know, I think it's important, as we look to our future that we see the importance and diversification.

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And it isn't just diversifying the revenue streams.

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It's in diversifying our donor base.

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Multiple identities.

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Creating an inclusive environment where people feel appreciated.

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So that you're forming authentic. That's what keeps people coming back.

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This one.

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It isn't the appeal.

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It's the connection.

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That's a connection. Thank you so much for reminding us, for of the importance of, I feel connections and also community feeling that there was a place of belonging where certainly we all can make a difference. Correct.

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As we look into the future. I have, you know, one last question. Almost one last question. I'd like to.

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Just kind of focus on some of the new things that are happening. You touched on the fact that our sector sometimes.

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Feel as if slow to change.

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But we are seeing some rapid changes with new technology to roll of AI.

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New voices.

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You heard from Sharon more nonprofit organizations which I can't believe. Another 3% increase 1.4.

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1 million nonprofits.

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And New World.

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So in your opinions.

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What calls to action? Would you leave.

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With our friends in the room, our development and executives, and hopefully, we have some volunteer leaders.

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Who are seeking.

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To create more resiliency, deeper donor relationships and sustainable results.

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For their organization.

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What are, what points would you leave with them as they go back.

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And and undertake this challenge that we put a call to action. What are the call to actions that they're gonna put in place. So, Marco, let's talk with you.

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What are you looking at, and what's the call to action that you want to leave with us?

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So I'll I mean I'll reiterate the the great points that both, you know, Jennifer, and and Tycely made, you know, largely.

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Thinking about.

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Staffing structure and strategic structure.

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I really think that you know this is a you know. What got us here is not gonna get us there.

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You know that we need to innovate. And so largely.

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How? What?

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A good starting point would be to look at your donor data.

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To understand. You know who are your donors.

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Where are they concentrated, you know, potentially, geographically.

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And you know, and and knowing retention, metrics or acquisition metrics.

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That.

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Information.

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Should inform where you have opportunities.

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Where you have challenges.

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And you can then plot that this is where we are.

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We want to be over here.

01:12:43.000 --> 01:12:57.000

And so what do we need to get there? And I think it's a great opportunity to to think about. You know. Staff structure resources. Do we have enough resources if we're trying to grow our individual giving? Well.

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How much are you investing in that.

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Do you, you know? Are you investing in tools in professional development training? You know, those are questions that I think you know kind of as as organizational leadership.

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You know, we need to be asking, or one needs to be asking, in order to to answer some of the those questions in terms of.

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You know.

01:13:20.000 --> 01:13:26.000

Doing something different, innovating and getting better results in the future.

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So you're really calling out a call of action to our development.

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Professionals.

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In the room. Jennifer Jennifer, love for you to speak more directly to our.

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Other partners in in the fundraising ecosystem, as relates to our CEO's executive directors. What is their ongoing role, and what is required of them during this moment.

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Sure I love everything that Marco just said. It's really where are you investing your resources? I think all of us.

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Who have been in pretty like the time it's been over 2 decades for me. You see a lot of churn. You see, younger people come in. They did get discouraged. They leave. You see, the annual tenure and fundraisers getting lower and lower. It doesn't serve anyone well to have someone in position for a year and a half. It's detrimental to organizations.

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It's detrimental to donor relationships.

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And I think for Ceos, it's really understanding what can drive longevity with a fundraiser. It's understanding to have realistic goals.

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And to allow that person to build those relationships over time relationships don't turn on a dime their relationships. So it may be a long runway, just as was talked about earlier. You know. What's the 6 months to 24 month plan for a donor? And so keeping that in mind, and knowing that the CEO is the top fundraiser, they're the ones who carry that message. They're the ones who need to be participating in some of those donor calls, and I think.

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Ceos shouldn't underestimate the impact that they can have on fundraising, and to really invest in that.

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Yeah, that's that's terrific. And and again, as a old Chief development officer, I always felt that it was my job to help set the table.

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That.

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Yeah.

01:15:23.000 --> 01:15:33.000

For my CEO to make sure that my CEO was gonna be successful and equip that individual with the kinds of questions. Even I would even sit with my CEO every Monday morning, just to make sure that the calls but, thank you. Calls were made so again. Imagine the pain of that, you

know, every Monday morning. But anyway, I did what I had to do to make sure that the job got done.

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As development professionals are volunteer leaders. What's your message to them?

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My message to our volunteer leaders is to.

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Let your light shine.

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Bright as possible.

01:15:49.000 --> 01:15:55.000

You don't need an invitation to help us.

01:15:55.000 --> 01:16:01.000

Increase our success. You are a critical part of how we succeed.

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And my other advice is to give us unsolicited advice on how to improve.

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Because we are grinding it out day in and day out.

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Because we're focusing on the individual elements of the tactics.

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There are likely areas of improvement areas of growth areas of opportunity that we overlook. And so we want to invite you to bring your lived experience.

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Your expertise. Your insights. Bring those to the forefront.

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Bring forth the inspiration for either the invention.

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Or the innovation. And I think when we find a way to come together as.

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Individuals committed to positive change. So whether that's the volunteer.

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Whether that's development officers, whether that's the CEO.

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Brenda, when we all come together and realize that there is strength in our shared.

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Yes.

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And our shared commitment.

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And I will also say.

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Both Jennifer and Marco referenced this, but I will also say.

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We have to enlarge that circle of spear.

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To also include trusted advisors.

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No matter where we sit in an organization, we can't.

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Bear all of this on our own. It is a great deal of work.

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Which is why our turnover rates, unfortunately, is where they are.

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So I wanna encourage individuals to also take.

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Here of yourself.

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We're in the midst of summertime, which often brings a little bit of reprieve.

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But it is my hope that you are not a martyr for the mission.

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You understand the importance of.

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Taking an oxygen, break.

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You understand the importance of leaving the office to engage in a hobby.

01:17:59.000 --> 01:18:04.000

You understand the importance of spending time with family and friends.

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And you understand the importance.

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Fine.

01:18:11.000 --> 01:18:12.000

Of taking care of you, because if you're not taking care of you, no matter what role that you have.

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You're not able to be a part of the solution. And we need you. We need you. We need you.

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Yeah. What a great point to leave us with. Put on your mask.

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Yes.

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So then you can help others.

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I do want to go back and just make one last point before we turn to QA. Relative to volunteer engagement as partners in fundraising.

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You know we we like to share with our clients that there are 4 roles that.

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Volunteer leaders can play, because not every volunteer leader is comfortable making an ask. So the 1st would be as a connector. So really understanding what's the role and where volunteers can best plug in? So again, the 1st could be as a connector where they're opening doors, making introductions.

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And and just being very

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Engage in terms of engage in their network. The other role that volunteer leaders can play is that of a storyteller.

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And volunteers are our best storyteller in partnership with our program folks. So again, don't forget about our program partners as well. The other role that board members and leaders can play is that as a visionary? Again, really understanding where the organization is going, the impact of the organization. And then, lastly, those donors and those leaders who are comfortable asking.

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Other donors to join them. So first, st if made their gift, and they're opening up the opportunity, and for other to experience the joy of giving and making a difference. So there's room for all of us.

01:19:42.000 --> 01:20:02.000

Around the table to make a meaningful contribution. So again, I just want to thank you, Marco Tisley and Jennifer, for your time with us. And now we're gonna spend. We have about 10 min left, and Sharon and Alexis are gonna come back on. And, Lucinda, you've been vetting questions. So why don't we turn it over to you and.

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Our our panel, and Sharon and Alexis, we're ready.

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So what questions do we have?

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Yes, we have some good questions that have come in.

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The 1st one I'm gonna start with is.

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Top of mind.

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How do you anticipate the 24 elections impacting, giving for this year.

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So top of mind for many, many people.

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So I'll jump in with some data. Being the the data here today. So giving us a data shows us that charitable giving during 8 of the past 9 presidential elections.

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Continue to grow.

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The exception was in 22,008 when we had the financial crisis. So in election years most donors appear to give both to charity and to campaigns.

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Where we do see shifts is on the results of the election. So depending on how elected officials are perceived to address.

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Societal needs or environmental factors. There could be an increase in giving.

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To those organizations where donors are concerned, that we might lose traction related, for instance, to climate change. Conversely, if donors are excited about the results of the election and feeling good about the economy, then they're more likely to give at a higher level, based on that.

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The the results of an election.

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But open to any other responses you want to share.

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Sharon. I think that data point is absolutely right on cause. We know that donors who give politically, and I, and as I always share with our clients when there's some hesitancy about asking for a million dollar gift, and maybe they've given a million dollars before. I'm like no one gives away their last 1 million dollars.

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So don't be afraid to make the ask.

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Well said.

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Lucinda. Next question, okay?

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Yes.

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The next question is around diversifying sources.

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So

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We've been talking about this. And of course, with the giving U.S.A. data.

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But what advice do you have for expanding and diversifying sources in this particular? Attendee? Is with an organization that's largely grant funded.

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And is working to expand into corporate and individual giving, and is looking for advice to expand those programs.

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So it's Tycely I'm happy to jump in. I will start by recommending you to make sure you're signing up for the various.

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Portals, where.

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Corporate employees actually sign on.

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To make employee based contributions. And so there are many platforms.

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Or employee giving campaigns are housed.

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All you have to do is just to make sure your organization.

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Recognized as a 501(c)(3) is within the listing of organizations.

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I would also encourage you to begin with your board.

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You really want to think through that multiplier effect.

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You want to let your board know and quantify that goal begin small.

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By the end of the year I'd like to have 50 new individual donors.

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And think through how the people around the table are gonna help you get there, is it? Everyone's gonna invite.

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5 new people.

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To invest in your work.

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It's simply trying to think big.

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While rolling your strategy back so that it's small and manageable.

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I'll

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Just to add to that that I think part of it, too, with individuals is making sure that your.

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Communicating and communicating in the.

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Way that they like to receive that information so.

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You know, making sure that it's meaningful.

01:24:14.000 --> 01:24:20.000

Making sure that they understand the impact of their gift. Once they make a contribution. So that.

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Cause you're not just there to get that.

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1st time gifter, that one gift.

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Trying to build a relationship. You're trying to ensure that there's a lifetime of giving. And so.

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One.

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One area where I see organizations.

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You know where they're not.

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They haven't. They haven't planned

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Their budget or their staff resources appropriately, is around that communications piece is to build out a communications plan to invest the time to, you know.

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To write a monthly E-newsletter or social media posts, or you know.

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Call a donor.

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Handwrite some letters like, there's a lot that goes into just maintaining that relationship, those relationships. So making sure that you budget time.

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Resources, and and and money towards that, I think, is is critical.

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Great.

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And the next 2 questions are also along the lines of relationships and cultivation.

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The next one is in particular around.

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How do I establish strong relationships and connections with high potential donors?

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So any advice or specific strategies about strengthening those types of relationships in particular.

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Happy to take that one, I think.

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Tisley's done such a nice job about talking about this, and so many of her remarks of it's all about your connections.

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Leveraging your connections? Who are the volunteers who are surrounded by you, and really

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I think Tesla really mentioned, like prioritizing your work.

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Focusing on the right things. What are those connections.

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And how do you carve out the time to make sure that you're moving those relationships forward? I think we can all be you know, we have so many emails coming in. We have people knocking on our door. We have so many distractions and just carving out that time for the important work, and really utilizing the human resources that you have, whether they be board members, volunteers, or even people in your community, to help make those introductions.

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Great.

01:26:36.000 --> 01:26:51.000
And one question just came in, Marco, as you were finishing your comments, and I think it's related to yours, Tycely, that you just gave. Do you have examples of those giving platforms?

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Well, of course I will introduce the black giving fund of which I am on the board, and it is headquartered in Charleston, South Carolina.

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So I.

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The Black Bot giving fund is certainly one example.

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There are many examples, and what I will do while we're wrapping up, I will see if we can find a link.

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To share some of those. But you wanna make sure that you're on the list for as many.

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Platforms for corporate giving, but also.

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Donor, advised funds. You wanna make sure when people have already part.

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Financial resources in places that whether it's fidelity or others.

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That. You're connected to those opportunities as well.

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Fantastic.

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In our oh, Marco, were you gonna add to that.

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Our last question.

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And again along the lines of relationships and connections.

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This particular attendee. Has a small team.

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And is looking for advice around sustainable solutions for authentic donor engagement with a small team in particular. Any thoughts.

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To share or advice for this particular attendee.

01:28:09.000 --> 01:28:25.000

I'll jump in and say, start from the inside out. You build it one person at a time. Ask one person to expand their network to 2 or 3 more to build it from the inside out, and please others join in.

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Yeah, I'll just throw out there. I think one thing that was really effective for me is, you know, kind of if I had like a hundred really close donors that I wanted to maintain a relationship with.

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I would write a personal email, but I would kind of

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You know. I I it wouldn't be, you know, kind of. I wouldn't spend an hour on each email. It'd usually be a copy and paste situation. But it is, you know, kind of I would leverage tools like that to make sure that you know an email is sincere. It's coming from. You might change it a little bit. Budget that time. But then, in addition to that, I would say,

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That!

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You know. Really, it's about that.

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Personal and the personal engagement. So one way to do that is, if you have either an issue that you do, that you want some public input into.

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Or you just wanna find out what is the best way to communicate or to provide updates is to send a survey, and you know, and then, just from the engagement of that survey, you'll probably identify who are the people who you should be talking to more because they've already engaged with you once.

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That's great. That's a really good suggestion.

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So then start to really hone in on those individuals as well.

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Well, we are unfortunately at time, so we don't have time for any more questions.

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Brenda, did you wanna wrap this up? And I can end with some logistics.

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I just want to again say, Thank you all so much. I'm excited and optimistic about the future, and I truly believe the best is yet to be so. Thank you all so much. Keep doing the great work that you're you're doing your change agents, and we need you. So keep going.

01:30:08.000 --> 01:30:14.000

Yes, and I also wanna echo that and think the panel, Marco Jennifer, and Tycely for joining us.

01:30:14.000 --> 01:30:24.000

Thank you, Sharon and Alexis, for your presentation around the giving U.S.A. data. And, Brenda, thank you for monitoring a really wonderful event and conversation.

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My honor to be a part of this team right?

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A few.

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See the survey.

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Yes, exactly. Speaking of surveys. As soon as we conclude here, you'll be prompted to take a very short survey. So please.

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Please do so. It's it's 4 questions really short, and it will give us really great feedback.

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You'll receive an email from us within 24 h with a link to this recording. So you'll have it for your own reference to share with friends or colleagues.

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Also, I wanted to remind everyone. This is approved for one cf. Credit.

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So if you are seeking your credential or recertification, this will count towards that.

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And then, finally, if we didn't answer your question or more questions arise, you can always find us at Info at Alfordcom, and we would love to continue the conversation there, and definitely keep in touch.

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Thank you.

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So again. Thank you to the panel. Thank you. Everyone for attending and for all of your contributions in the chat.

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And we're gonna disconnect, but I hope everyone has a great day, and we will continue to keep in touch offline.

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Thank you. Everyone.

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Thank you.