Data-driven decisions:
Nonprofit giving trends

presented by

sylogist™

and

Microsoft

Welcome!

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SylogistMission CRM

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Director, Business Development,
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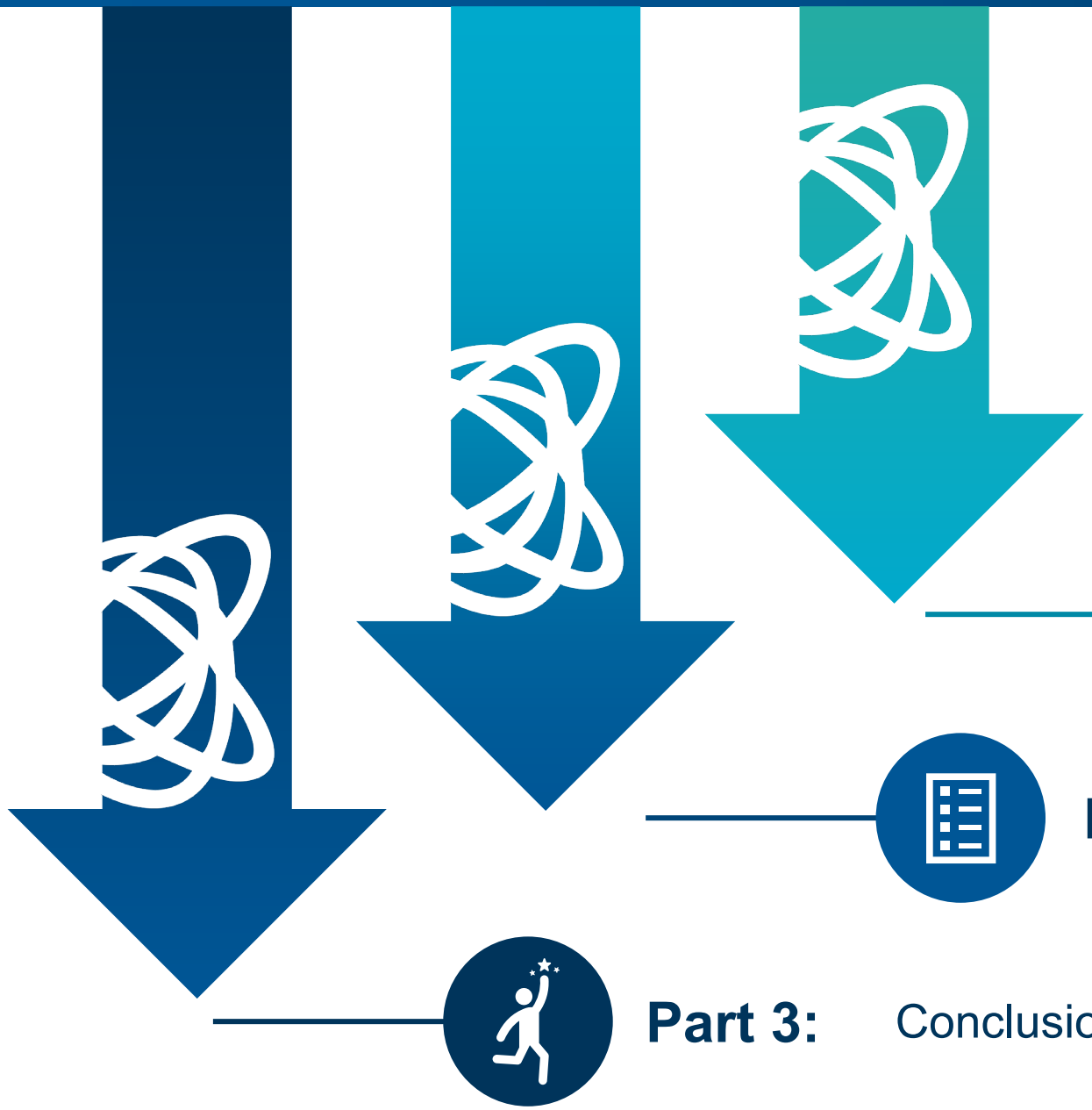
Agenda



Part 1: Key trends in giving & nonprofit operations

Part 2: A deeper look at a few specific trends

Part 3: Conclusions & success stories

Part 1: Key Trends Overview

Trends: what we saw in 2023 and what we expect to see more of in 2024

Technology Trends

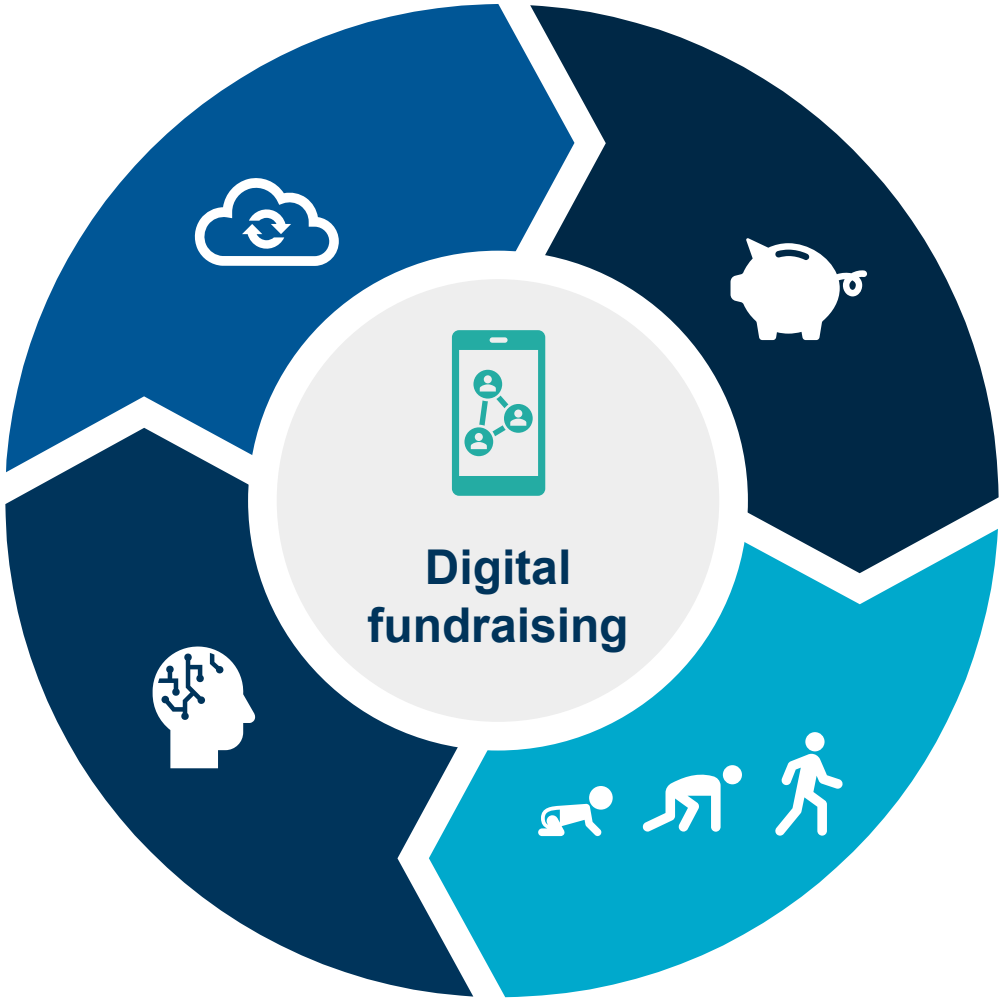
Changes in Individual Giving and the Giving Market

2023 & 2024 Trends

Cloud-based,
SaaS software

Donor-Advised
Funds

Technology



Giving

Artificial
Intelligence

Generational giving
preferences

Technology Trends:
Cloud-based software

Licensing

Software as a Service (SaaS)

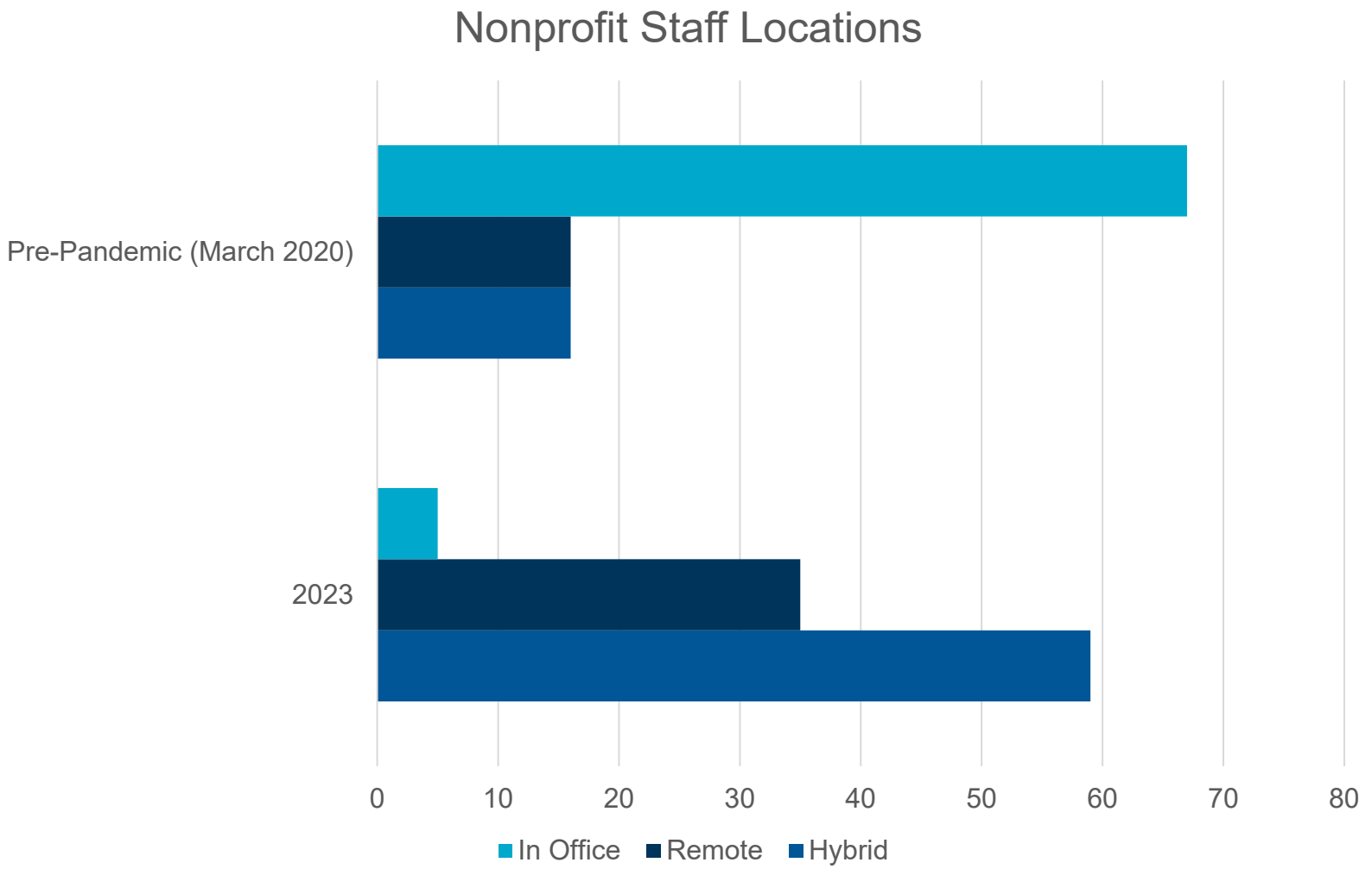
Other licensing models

Data storage

Cloud-based software

On-premise

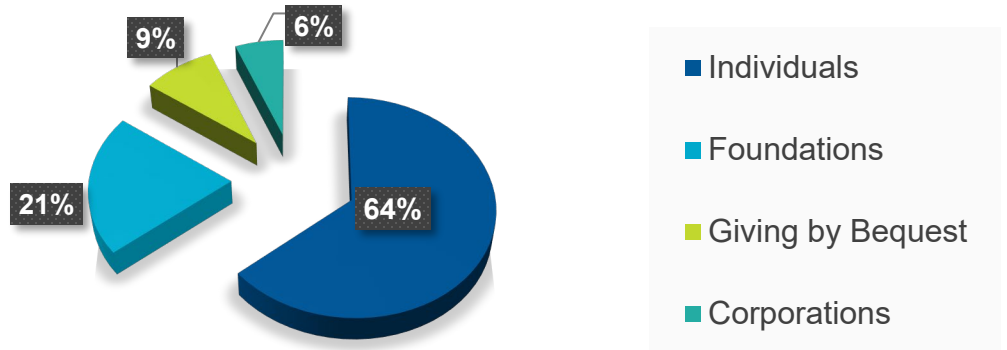
Technology Trends:
Staffing & Artificial Intelligence



Source: 2023 Nonprofit Communications Trends Report | Nonprofit Marketing Guide

Giving Trends

In **2022**, Americans gave
$499.33 billion (USD)*
to charity



10.5% decline over 2021
(adjusted for inflation)

Foundations: +2.5%

Bequest: +2.3%

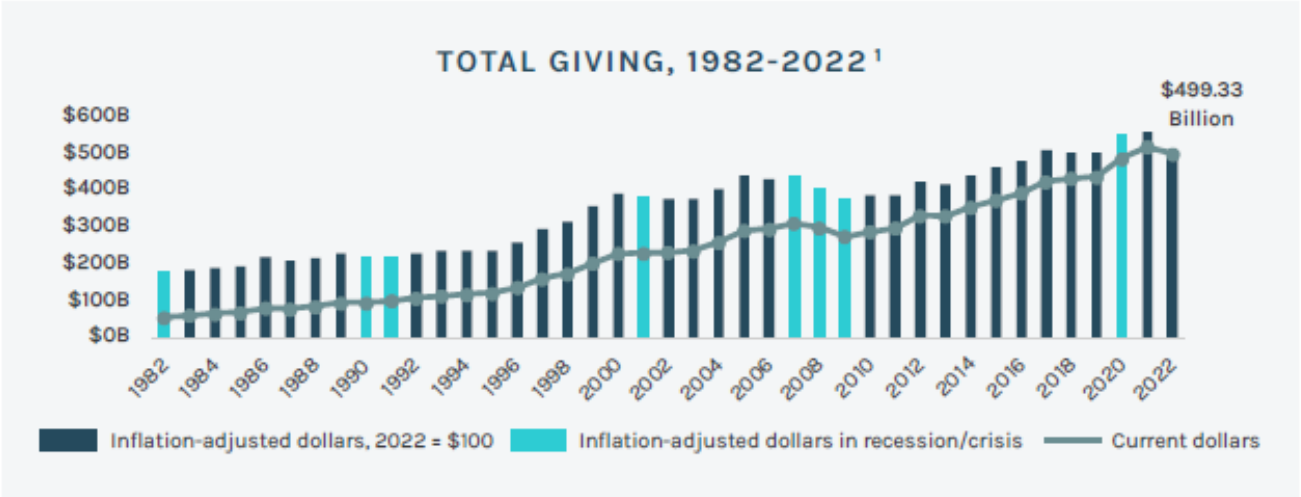
Corporations: + 3.4%

Individuals: -6.4%

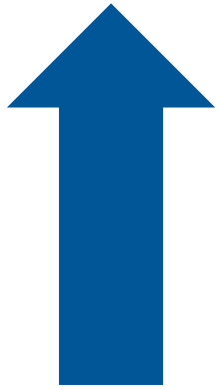
*Source: Giving USA 2023 Report, GivingUSA

Giving Trends

Giving stability over time

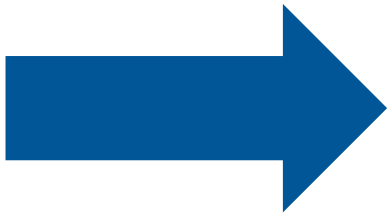


Giving Trends
Donor-Advised Funds



$228 billion

in 2022*



Payouts

28.7% in 2021
22.5% in 2022

*Source: https://www.nptrust.org/reports/daf-report/

Generational preferences for giving

Millennials (1980-1994)

84% give to charity, donating an annual average of $481 across 3.3 organizations

11% of total US giving*

25.9% of US population

Respond best to:

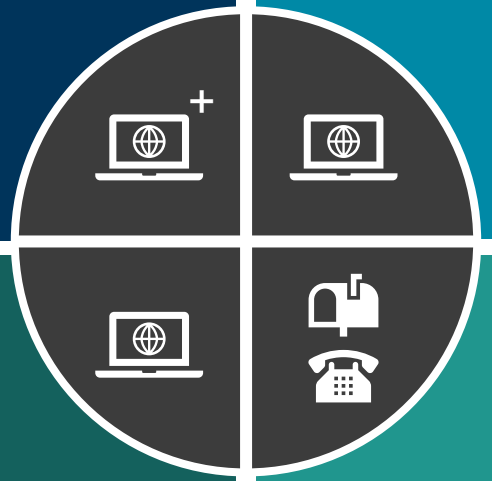
(1945-1964) Baby Boomers

72% give to charity, donating an annual average of $1,212 across 4.5 organizations

41% of total US giving**

23.6% of the US population

Respond best to:



20.4% of US population

Respond best to:

Gen Xers (1965-1979)

88% give to charity, donating an annual average of $1,367 across 6.2 organizations

26% of total US giving

11.8% of the US population

Respond best to:

(1901-1945) Greatest & Silent Gen

Contact method

Direct mail | Voice Calls | Emails | Text Messages | Social Media Posts

Preferred way to donate

Online Donations | Donate by phone | Response to direct mail

*Source: https://nonprofitssource.com/online-giving-statistics/

**Source: https://www.aarp.org/money/budgeting-saving/info-2018/boomers-most-charitable.html

+https://doublethedonation.com/nonprofit-fundraising-statistics/

Part 2: Going deeper

Agile Financial Management

Compliance & Transparency

Demonstrating Impact

Storytelling

Data Security & Fraud Prevention

CRM – Donor Management & Fundraising

Executive Management

Financial Operations & Procurement

Award, Grant & Program Management

Supply Chain & Material Management

Payroll & Human Resource Management

Purpose-built to support the day in the life of a nonprofit

sylogist™

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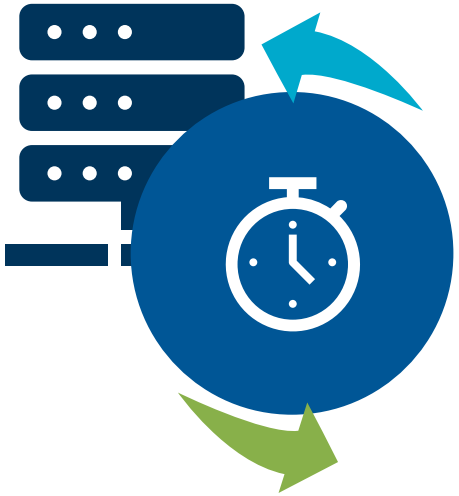
Part 2: Going deeper

Data-driven strategy

360-degree view of all donors



Real-time data

Identify and engage supporters

Bryan Cranston - Saved

Contact · MISSION CRM: Contact Donor

Jill Byrne
Portfolio Owner

True
VIP

Moves
Active for 8 months

Identification → **Cultivation (7 Mo)** → Solicitation → Stewardship

Summary | Details | Addresses | Recognition | Connections | Groups | Donation Information | Membership | DonorSearch | Volunteer Engagement | Timeline | Insight | Marketing Lists | ···

CONTACT INFORMATION

Constituent Number	CON-1345
First Name	Bryan
Last Name *	Cranston
Maiden Name	---
Nickname	Bryan
Gender	Male
Pronoun	he/him/his
Ethnicity	---
Suffix	---
Salutation	Mr. Cranston
Informal Salutation	Bryan
Formal Salutation	Mr. Bryan Cranston

ART CENTER 2024 FUNDING

IN SOLICITATION:	POTENTIAL AMOUNT:
CULTIVATE	$150000.00
DAYS IN SOLICITATION:	**ACTIVE OPPORTUNITIES:**
140	1

FIRST GIFT:
$100.00
DATE:
JUL 12, 2023

LAST GIFT:
$10.00
DATE:
FEB 23, 2024

LIFETIME GIVING:
$349,549.25
LAST GIFT:
FEB 23, 2024

NEXT RECURRING GIFT:
MAR 23
LAST RECURRING GIFT:
FEB 23 | $10.00

HOUSEHOLD

Household	Cranston Household
Household Relationship	Primary Household Member

COMPANY

Company	MISSION CRM
Job Title	Ambassador

SUPPORTING OBJECTIVES

AC — Art Center Expansion
Art Education

Ar — At risk youth disease prevention
Global Health

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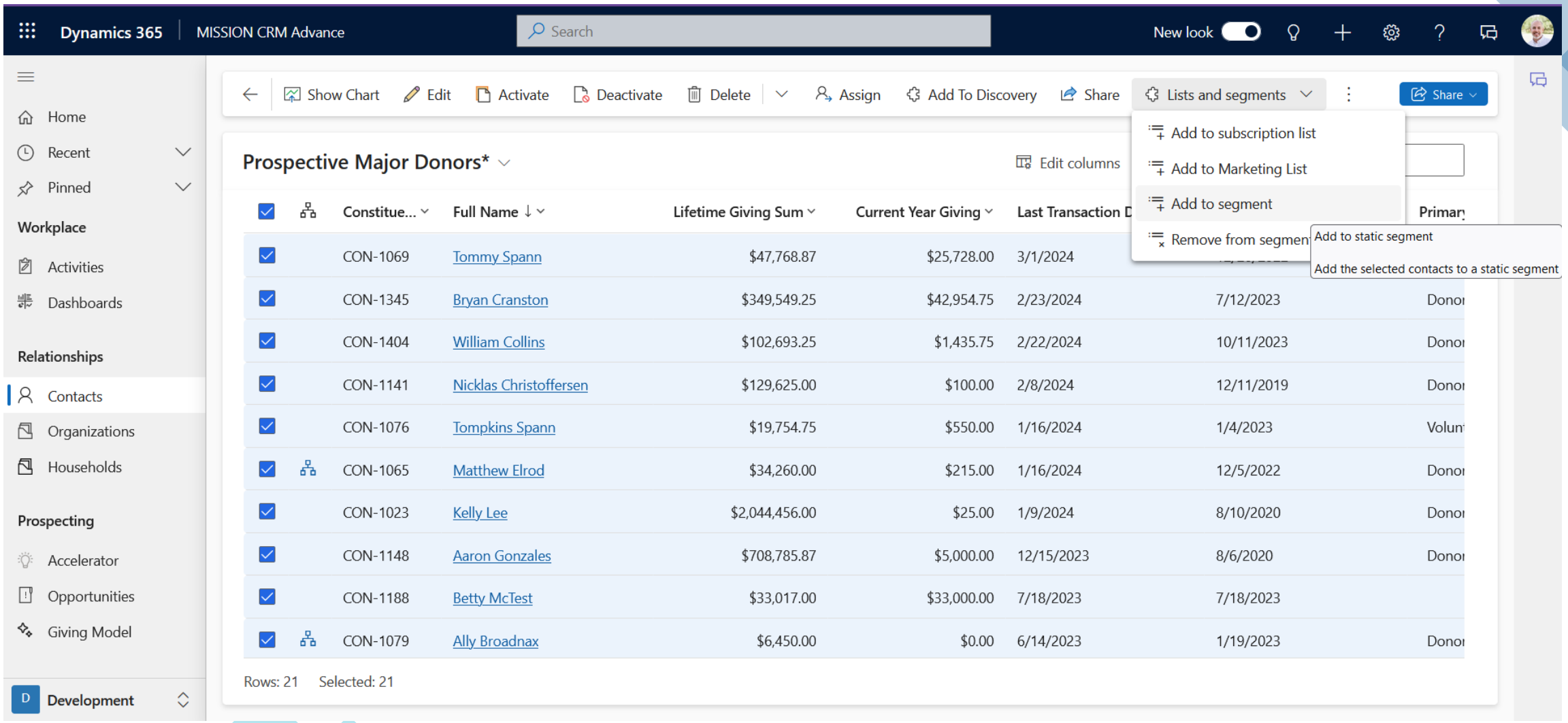
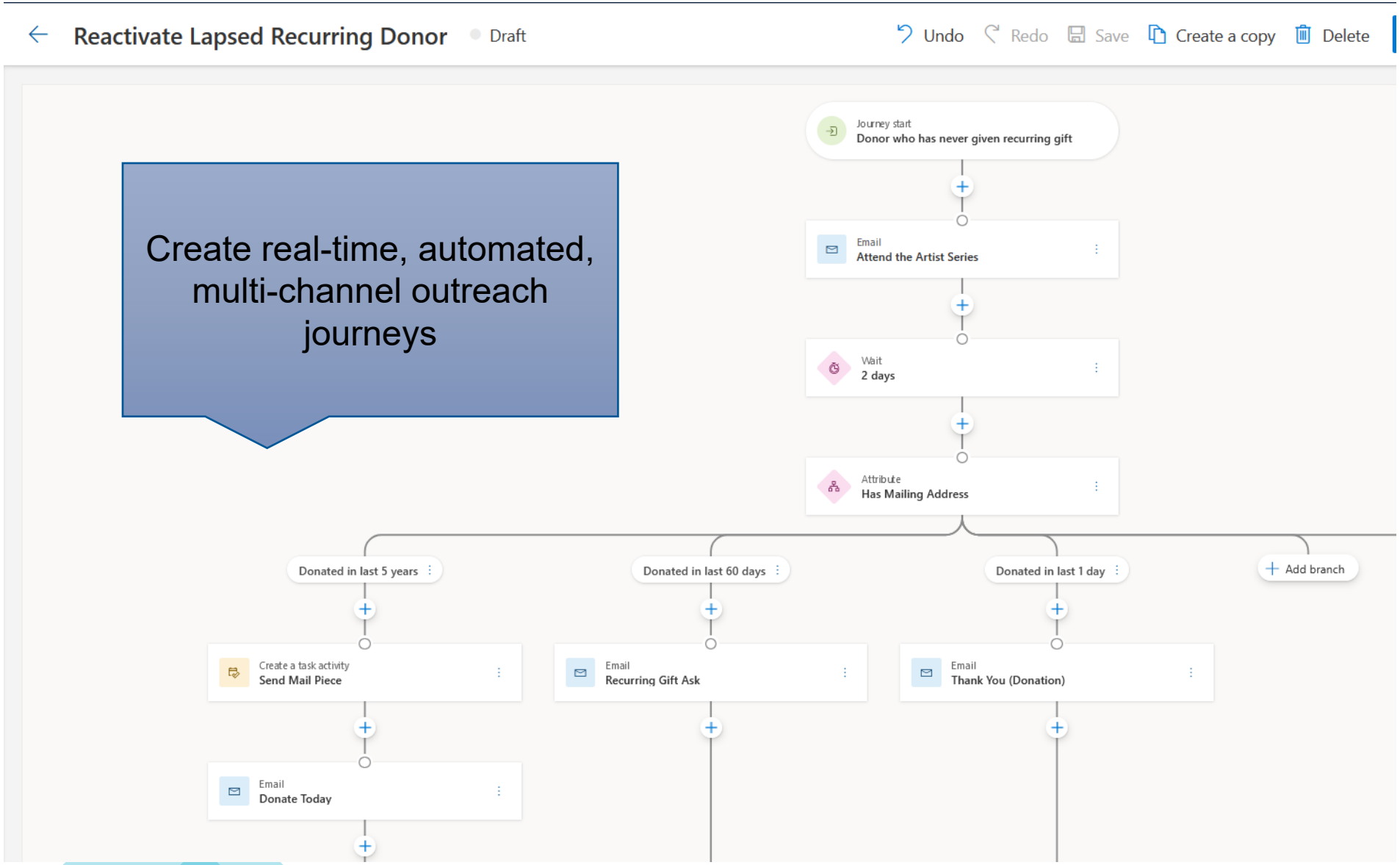

Dynamics 365
MISSION CRM Advance
Search
New look
Home
Recent
Pinned
Workplace
Activities
Dashboards
Relationships
Contacts
Organizations
Households
Prospecting
Accelerator
Opportunities
Giving Model
Development
Show Chart
Edit
Activate
Deactivate
Delete
Assign
Add To Discovery
Share
Lists and segments
Add to subscription list
Add to Marketing List
Add to segment
Remove from segmen
Add to static segment
Add the selected contacts to a static segment
Share
Prospective Major Donors*
Edit columns
Constitue...
Full Name
Lifetime Giving Sum
Current Year Giving
Last Transaction D
Primary
CON-1069 Tommy Spann $47,768.87 $25,728.00 3/1/2024
CON-1345 Bryan Cranston $349,549.25 $42,954.75 2/23/2024 7/12/2023 Donor
CON-1404 William Collins $102,693.25 $1,435.75 2/22/2024 10/11/2023 Donor
CON-1141 Nicklas Christoffersen $129,625.00 $100.00 2/8/2024 12/11/2019 Donor
CON-1076 Tompkins Spann $19,754.75 $550.00 1/16/2024 1/4/2023 Volun
CON-1065 Matthew Elrod $34,260.00 $215.00 1/16/2024 12/5/2022 Donor
CON-1023 Kelly Lee $2,044,456.00 $25.00 1/9/2024 8/10/2020 Donor
CON-1148 Aaron Gonzales $708,785.87 $5,000.00 12/15/2023 8/6/2020 Donor
CON-1188 Betty McTest $33,017.00 $33,000.00 7/18/2023 7/18/2023
CON-1079 Ally Broadnax $6,450.00 $0.00 6/14/2023 1/19/2023 Donor
Rows: 21 Selected: 21


Reactivate Lapsed Recurring Donor
Draft
Undo
Redo
Save
Create a copy
Delete
Create real-time, automated, multi-channel outreach journeys
Journey start
Donor who has never given recurring gift
Email
Attend the Artist Series
Wait
2 days
Attribute
Has Mailing Address
Donated in last 5 years
Donated in last 60 days
Donated in last 1 day
Add branch
Create a task activity
Send Mail Piece
Email
Donate Today
Email
Recurring Gift Ask
Email
Thank You (Donation)

YoY Growth Fundraising

MISSION CRM by sylogist

Date

Last 3 Years

3/6/2021 - 3/5/2024

Account | Contact

Designation: All

Campaign: All

Appeal: All

Package: All

Constituent Type: All

Data Entry Source: All

CAMPAIGNS

Year	2021		2022		2023		2024	
KPI	Revenue	Growth	Revenue	Growth	Revenue	Growth	Revenue	Growth
Goal			$8,250,000	100 %	$250,000	-97 %		-100 %
Revenue			$7,523,040	100 %	$296,841	-96 %		-100 %
Donor Commitments			$5,395,584	100 %	$215,650	-96 %		-100 %
Transactions			$3,364,599	100 %	$81,191	-98 %		-100 %

APPEALS

Year	2021		2022		2023		2024	
KPI	Revenue	Growth	Revenue	Growth	Revenue	Growth	Revenue	Growth
Goal			$4,054,000	100 %		-100 %		
Revenue			$2,502,502	100 %		-100 %		
Donor Commitments			$1,980,519	100 %		-100 %		
Transactions			$1,744,641	100 %		-100 %		

EVENTS

Year	2021		2022		2023		2024	
KPI	Revenue	Growth	Revenue	Growth	Revenue	Growth	Revenue	Growth
Goal			$2,910,000.00	100 %	$50,000.00	-98 %		-100 %
Revenue			$21,735.00	100 %	$22,675.00	4 %		-100 %
Goal Realized			0.75%	100 %	45.35%	5,972 %		-100 %
Events Actioned					$2	100 %		-100 %
Registration Packages			$32	100 %	$24	-25 %		-100 %

Fundraiser Donor Portfolio

Period: 2023

Fundraiser: Tommy Spann

TOTAL DONORS

47

+43 +1075.0%

DONORS in DISCOVERY

4

MY DONOR DONATIONS

$507.00

DONATIONS COLLECTED BY ME

$11.79K

MY DONOR PLEDGES

$63.50K

PLEDGES RECORDED BY ME

$490.90K

PORTFOLIO ACTIVITY

RECURRING DONORS

MY DONORS

Created On	Donor ID & Name	Lifetime Giving
17-Jul-23	ACC-1050 - Cranston Household	$327,845
05-Jul-22	CON-1162 - Gabriella Morales	$208,841
19-Jan-23	ACC-1015 - Spann Household	$41,403
05-Jul-22	CON-1062 - Gabriel Diaz	$20,000
20-Apr-23	ACC-1030 - Bennett Household	$8,415

DONOR DONATION ACTIVITY

Book Date	Transaction #	Donor ID & Name	Amount	Recurring	Ownership
14-Jun-23	00001609		$25		Transaction
26-May-23	00001580	3-01013 - Adventure Works Cycles	$1,000		Transaction
01-Jun-23	00001591	3-01025 - Alpine Ski House	$150		Transaction
08-May-23	00001521	ACC-1024 - A. Datum Corporation	$50	Y	Donor
27-Jan-23	00001253	CON-1051 - Mary Union	$900		Transaction

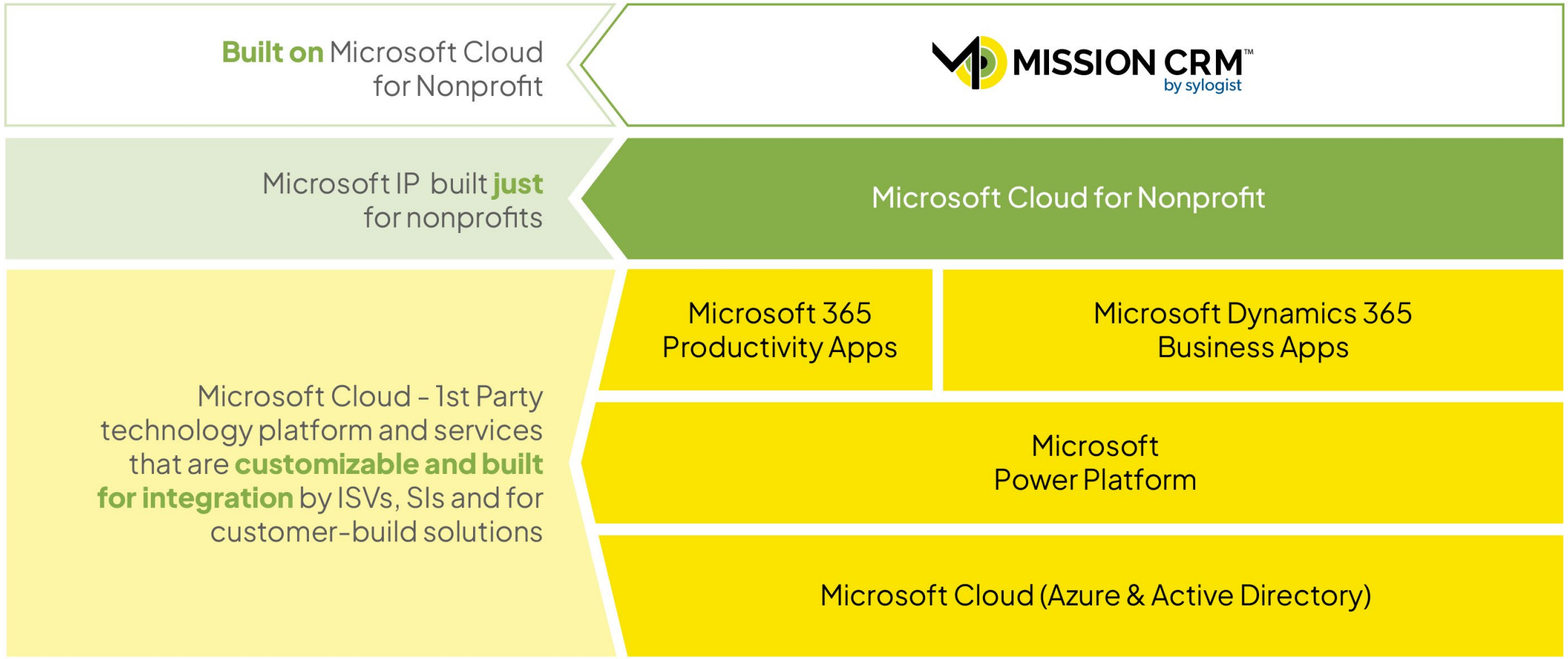
DONOR PLEDGE ACTIVITY

Book Date	Transaction #	Donor ID & Name	Amount	Ownership
07-Oct-23	Pledge - 75FEB7 Pledge Allocation 4 - Maternal Health	CON-1162 - Gabriella Morales	$50,000	Donor
26-May-23	00001035	CON-1182 - Bobby Brown	$3,500	Donor
25-May-23	00001034	CON-1182 - Bobby Brown	$10,000	Portfolio
Total			**$63,500**	**Portfolio**

DONOR EVENT ACTIVITY

Book Date	Identifier	Donor ID & Name	Amount	Ownership
01-May-23	EPKG-1025	3-01013 - Adventure Works Cycles	6,025.00	Package
17-Jan-23	EPKG-1004	CON-1069 - Tommy Spann	0.00	Package
17-Jan-23	EPKG-1005	CON-1069 - Tommy Spann	405.00	Package
Total			**6,430.00**	**Package**

One mission. **One** organization. **One** platform.



Part 3: Conclusions & Success Story

How embracing these trends allow for data-driven decision making

Success Story

"Thanks to Sylogist, we were able to respond immediately online to requests as they came in because we had zero downtime or business disruption during one of the most destructive storms in history."

Peter McPartland
Chief Financial Officer, Diocese of Venice

DIOCESE OF VENICE IN FLORIDA

sylogist™ mission | ERP

MISSION CRM™ by sylogist

Sylogist is trusted by:

Archdiocese of Seattle

Archdiocese of Toronto

Billy Graham Evangelistic Association

Boys & Girls Clubs of America

Catholic Charities USA

Food Banks Canada / Banques alimentaires Canada

Right To Play

The Salvation Army Eastern Territory

St John Ambulance

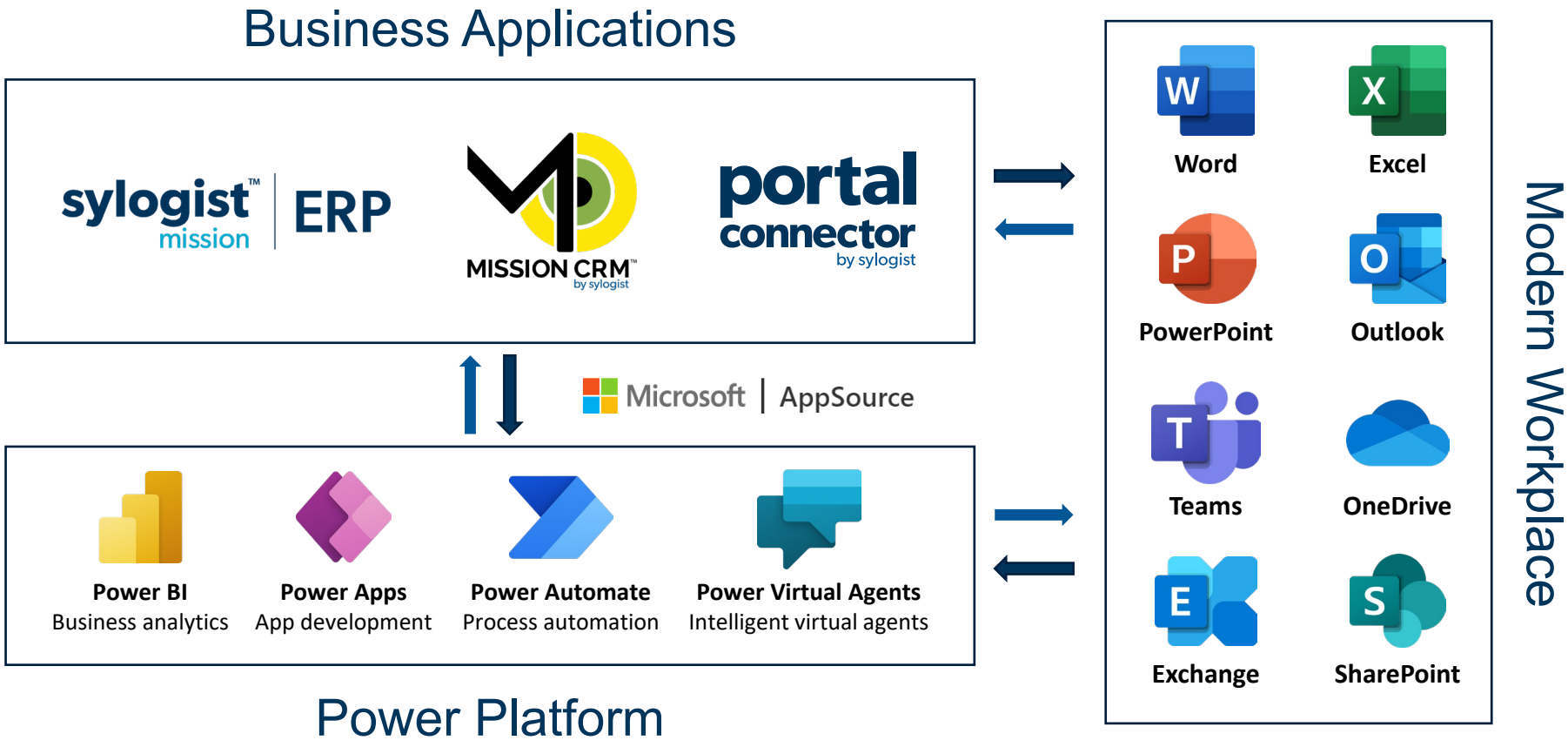
Team Rubicon Disaster Response

USS Midway Museum

United Way

World Vision

Sylogist Solutions Fully Leverage the Microsoft Stack.



Questions

What's next?

Resources from

sylogist™ mission

Blog Articles:

Key trends in the giving market

Artificial Intelligence for Nonprofits - 101

Artificial Intelligence for Nonprofits - 102

Success story – Diocese of Venice

View blog posts, download resources, and request a demo

https://www.sylogist.com/microsoft-webinar

Resources from

Microsoft

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