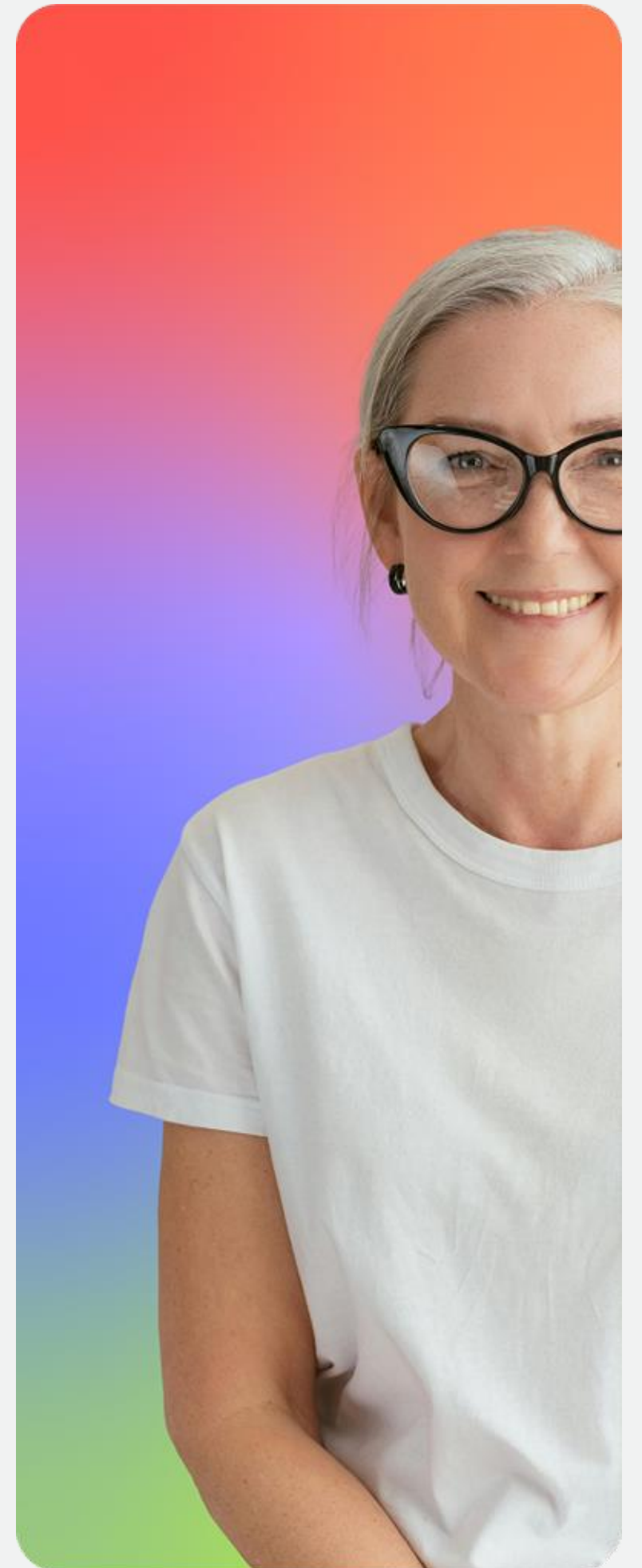




# How Using AI & Fundraising Automation Can Lead to a Winning Upgrade & Retention Strategy

A Brad Cecil & Associates and Avid-Powered Workshop





## Bryce Johnston

Director of Digital Strategy,  
Brad Cecil & Associates

Fundraising Optimization Nerd • Golf enthusiast  
Texas born and bred • FI fanatic

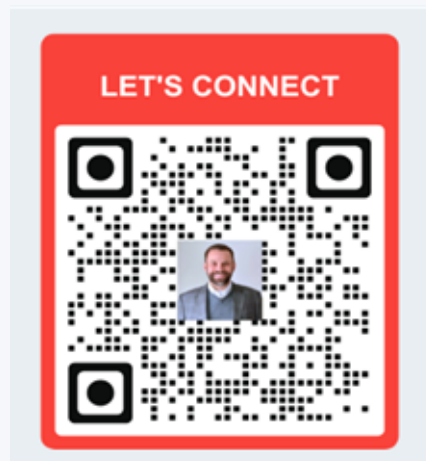


*Avid*

# Erik Tomalis

Chief Community Officer

Recovering Fundraiser • Founder of Top Gun  
Takeoff Duquesne Basketball Fanatic • Dog Dad x2



# Today we will explore together

1

What we are seeing today when it comes to donor upgrades and retention

2

Strategic next steps I can implement right away

3

How to know who to target & segment

# Meet Your Neighbor

1. Name, organization, role.
2. Which season has the best candy?  
***Halloween, Christmas, Valentine's, Easter, Other?***

# Avid

# Brad Cecil & ASSOCIATES

## The Fundraising Operating System



The system that turns donor insight into action—scaling your impact without scaling your team.

Fundraising teams that trust BCA & Avid.



BRAZOS VALLEY  
**foodbank**



**ACH**  
child and family services  
protecting children.  
preserving families. since 1915.



**ALAMEDA  
FOOD BANK**  
Feeding the Island since 1977



*the* **STEW POT**

**THE IMPORTANCE OF KNOWING  
YOUR DATA & BENCHMARKS.**

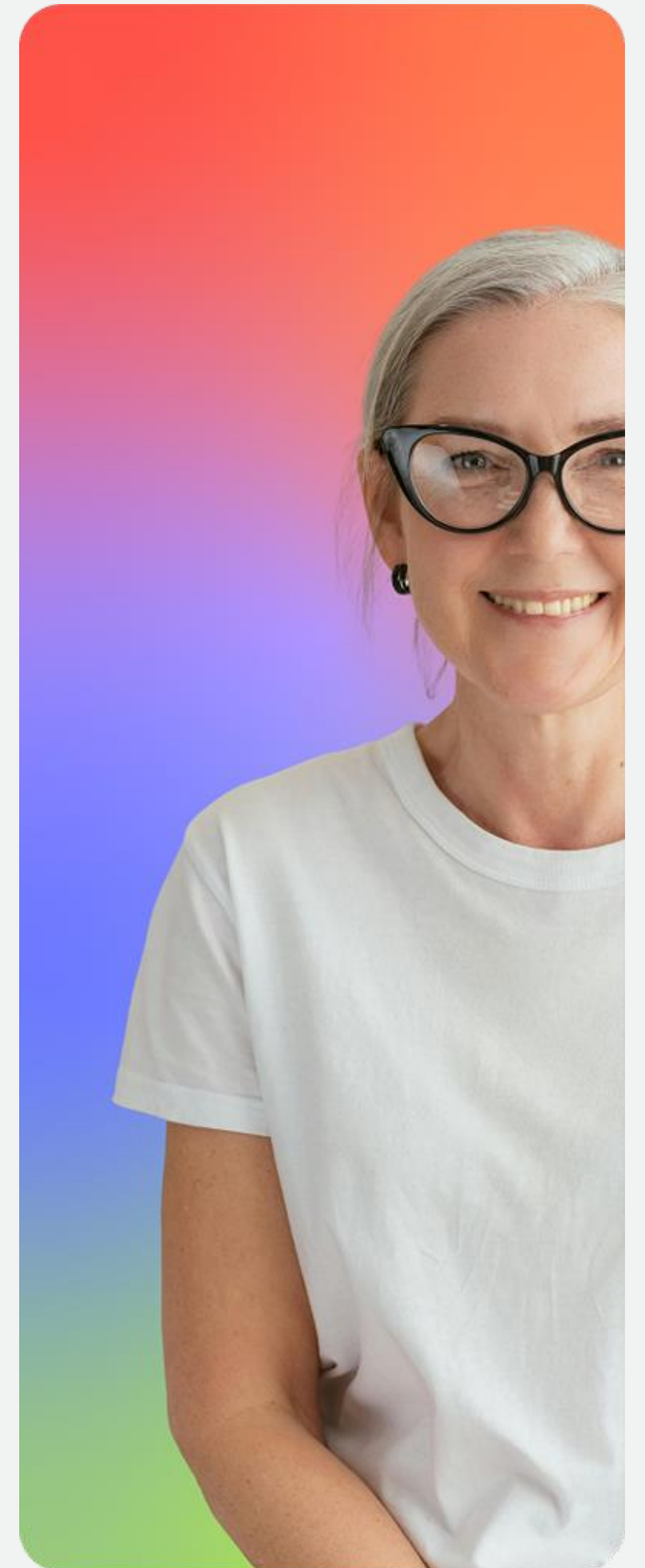
*Avid*

# The State of Nonprofit Fundraising in 2026:

## From Static Reports to Real- Time Strategy

An Avid-Powered Discussion

Philanthropy in Action 2026





## Fundraising Benchmarks. Rebuilt.

Most benchmarks are a history lesson—showing you what happened over 6 months ago.

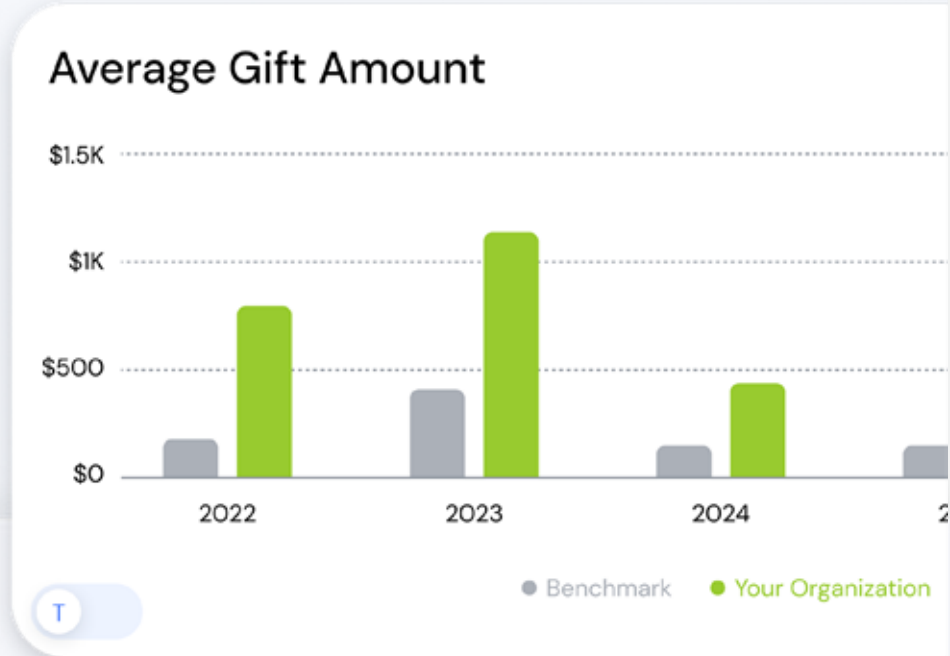
Avid + Wiland benchmarks are built differently.

- **Real Data.** Not Surveys.
- **1,000+ Nonprofits.** \$14B in Annual Giving.
- **Always Up to Date.** Not 6+ Months Olds.

**Get clarity now** while you still have time to act.

Activate Your Free Access

[avidai.com/benchmark](https://avidai.com/benchmark)



### Benchmarks



## Avid + Wiland

A current view of giving.  
**Built from 1,000 nonprofits**  
 Updated monthly with data from more than 1,000 nonprofits, the essential KPIs along with insights you want to see on multichannel behavior.

Custom built with Wiland, it helps you see what's really happening.

[Learn more about Benchmarks](#)

# Benchmark Universe



Data presented is for completed trailing 12 month periods as of the latest full month, with each period indicated by its end year



Nonprofits  
**1,015**



Average Revenue  
**\$14,117,109**



Average Active Donors  
**39,633**



Last Donation  
**May 31, 2026**



**WHAT WE ARE SEEING.**

**AND WHY THESE NUMBERS MATTER.**

All Nonprofits

Education

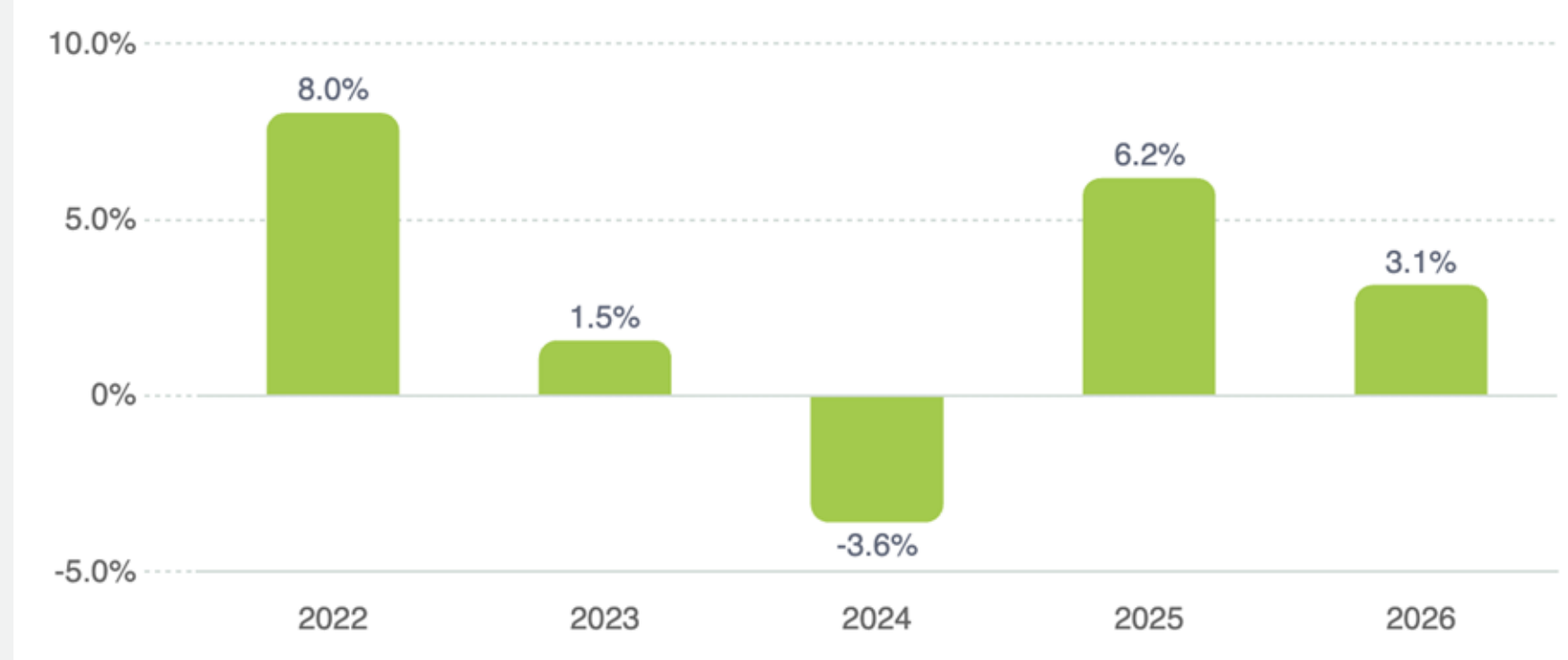
Faith-Based

Health & Human Services

# Revenue

Revenue is up, but it hasn't kept up with inflation.

### Percentage Change in Revenue (from previous period)



# 7.1%

4-Year Growth Rate

# 15%

4-Year Inflation Rate

All Nonprofits

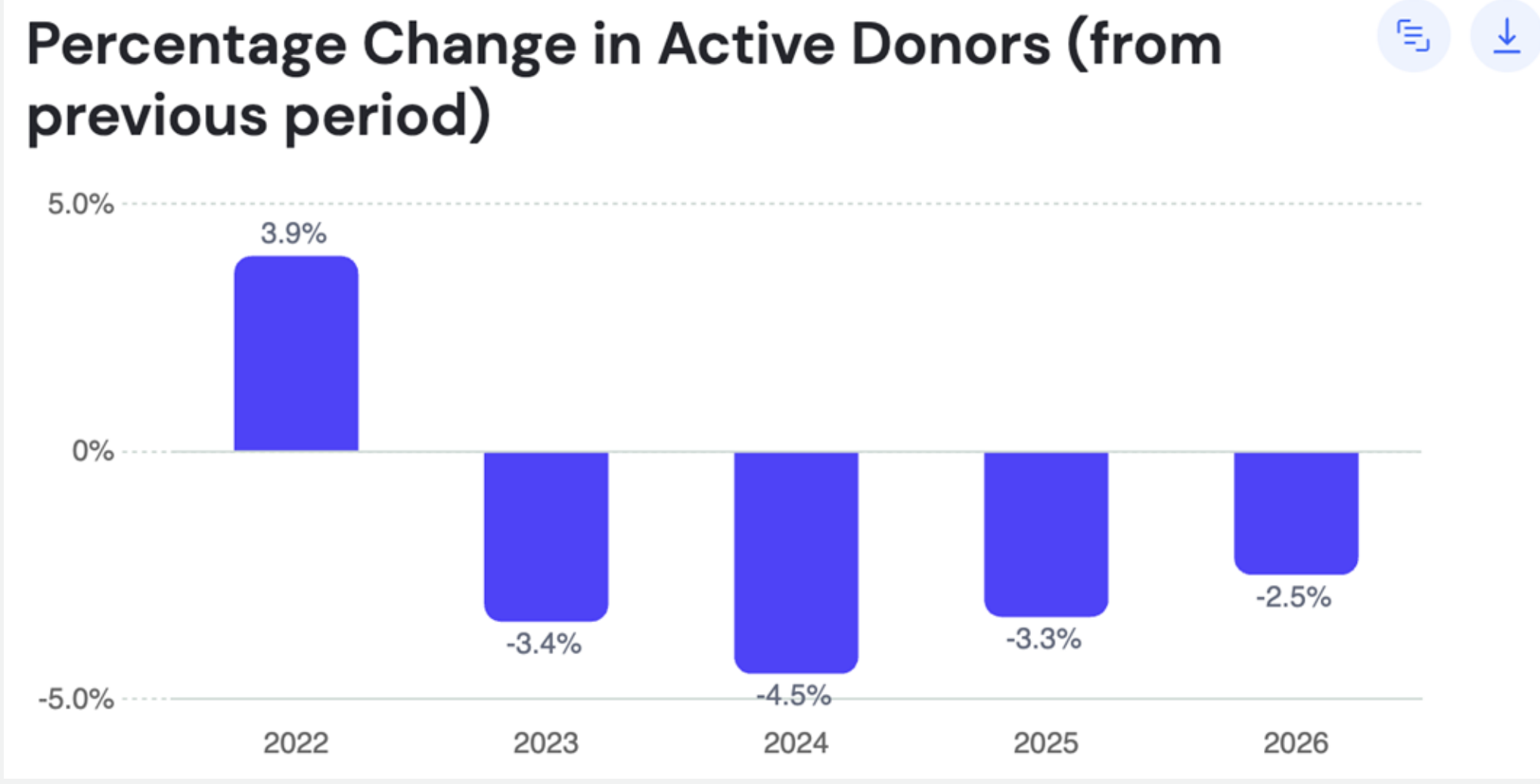
Education

Faith-Based

Health & Human Services

# Number of Donors

The continual trend remains—fewer people are giving larger gifts.



All Nonprofits

Education

Faith-Based

Health & Human Services

# Mid-level

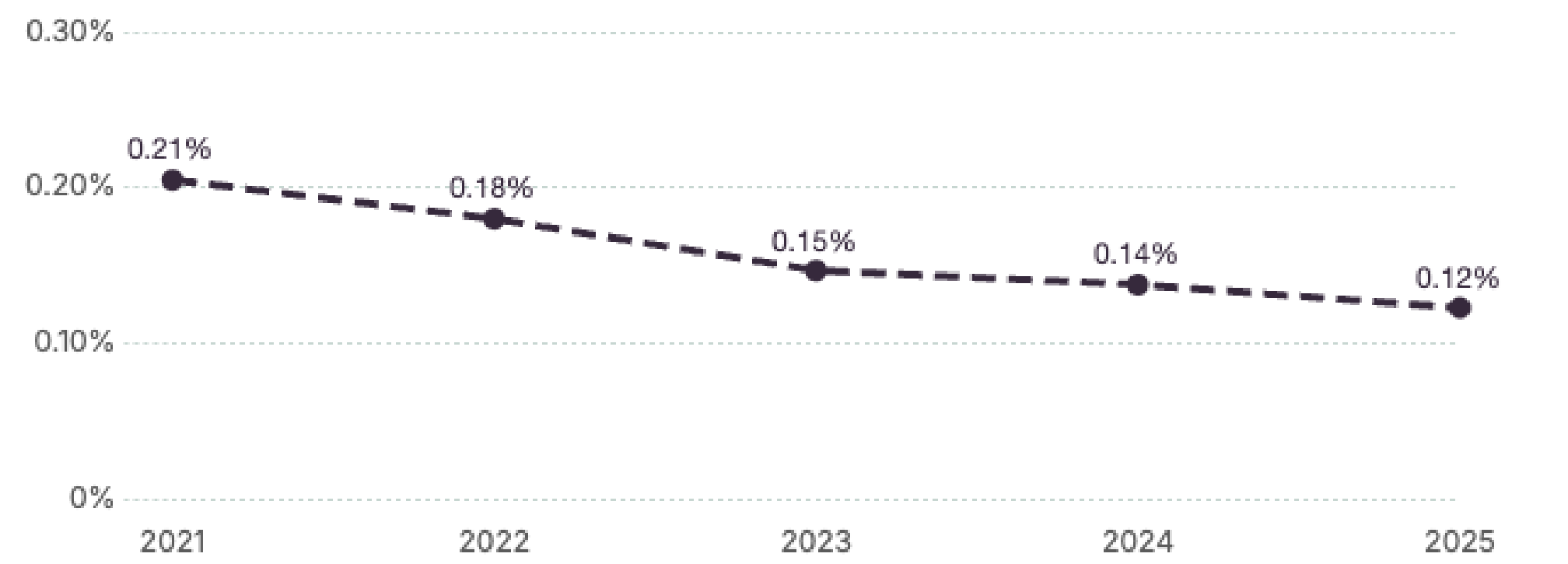
Upgrade Rates are at a 5-Year Low

**Avid**

## Midlevel Upgrade Rate <sup>?</sup>



What percentage of available donors upgraded to midlevel in this period?



All Nonprofits

Education

Faith-Based

Health & Human Services

**Avid**

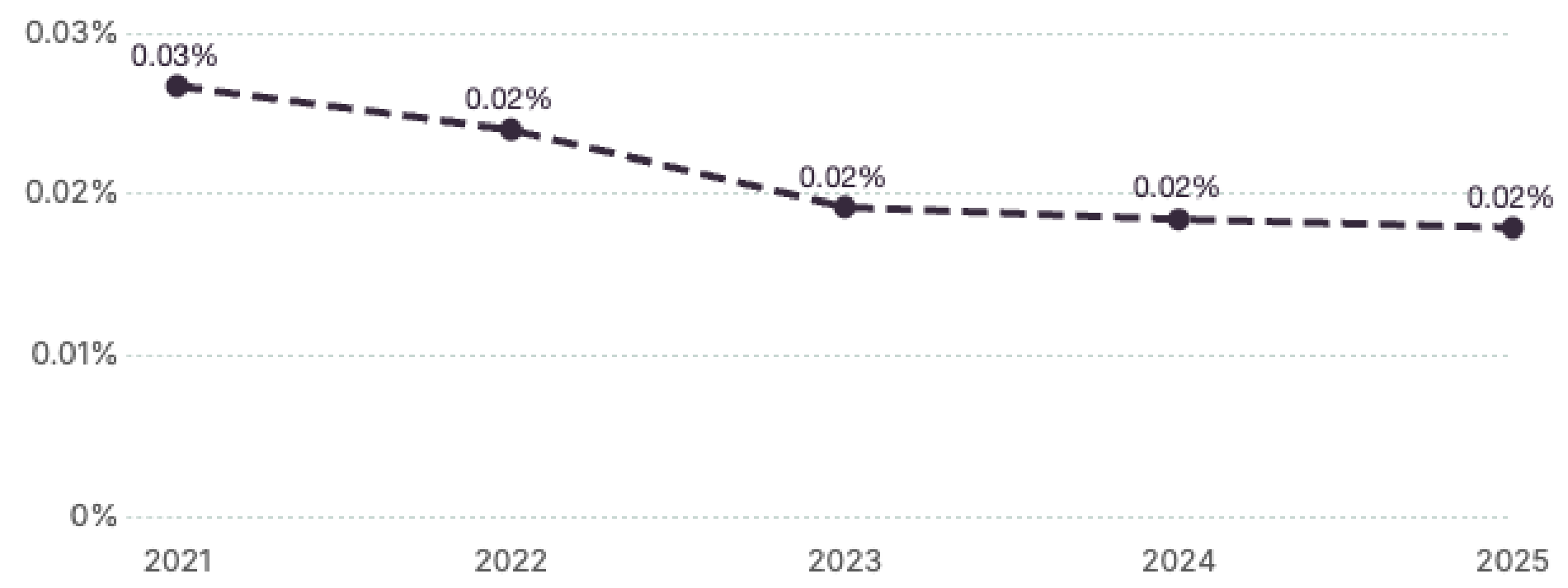
# Major Donor

Upgrade Rates are at a 5-Year Low



## Major Donor Upgrade Rate <sup>?</sup>

What percentage of available donors upgraded to major in this period?



# Active Donors

Continue to decline.



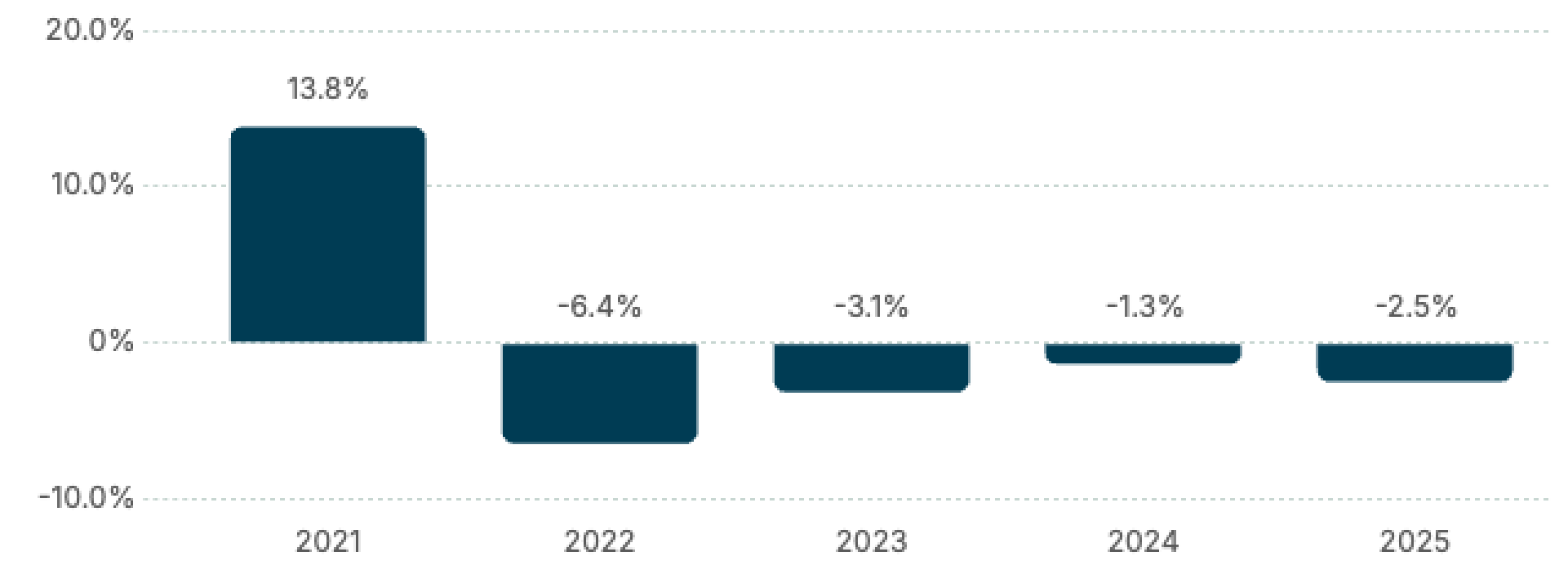
- All Nonprofits
- Education
- Faith-Based
- Health & Human Services

**Avid**

## Percentage Change in Active Donors (from previous period)



How has the number of active donors changed compared to the previous period, based on the current filters?



All Nonprofits

Education

Faith-Based

Health & Human Services

**Avid**

# Donor Reactivation

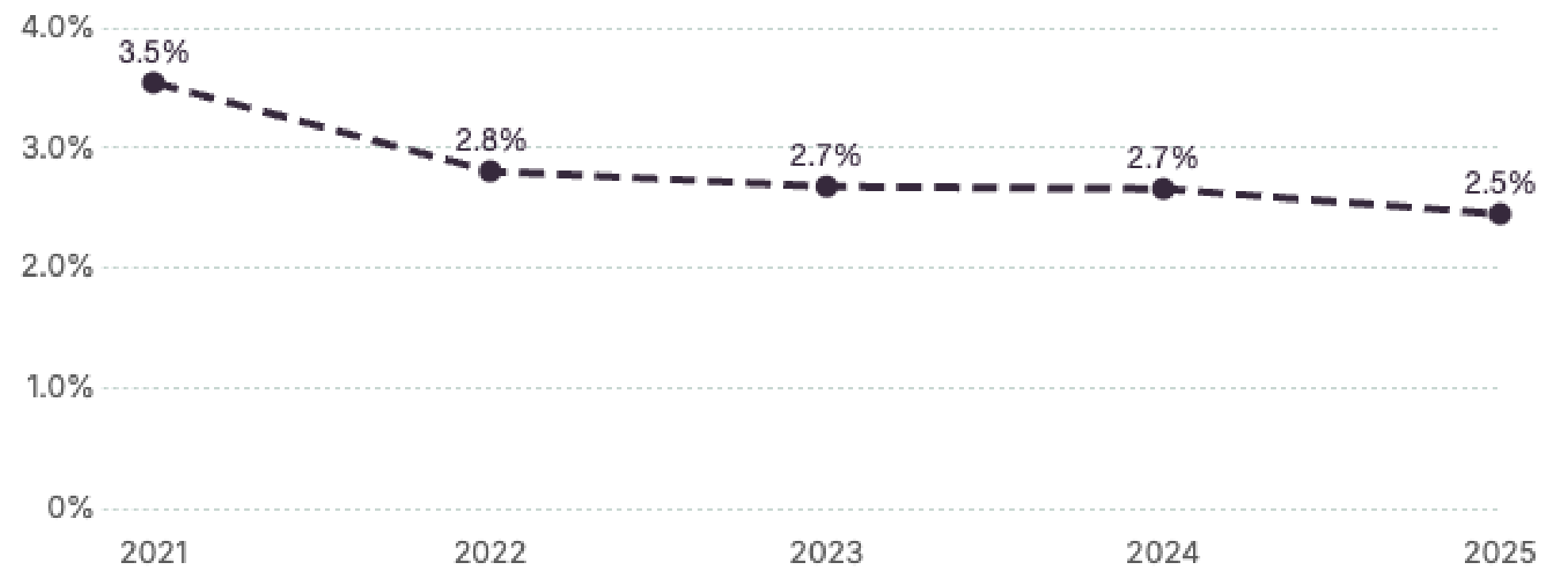
Rates are at a 5-Year Low



## Reactivation Rate <sup>?</sup>



What percentage of previously lapsed donors made a donation during this period?



All Nonprofits

Education

Faith-Based

Health & Human Services

*Avid*

# Donor Retention

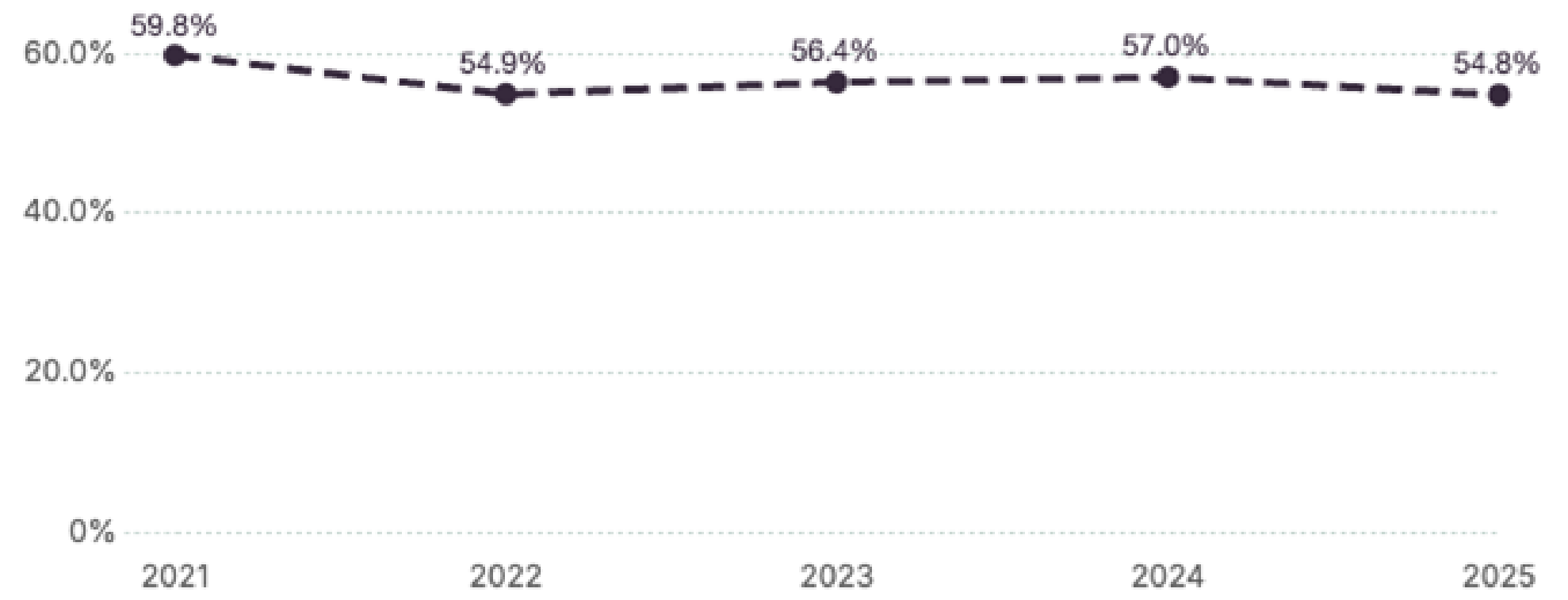
Rates are at a 5-Year Low



## Retention Rate <sup>?</sup>



What percentage of donors were retained from the previous period?



All Nonprofits

Education

Faith-Based

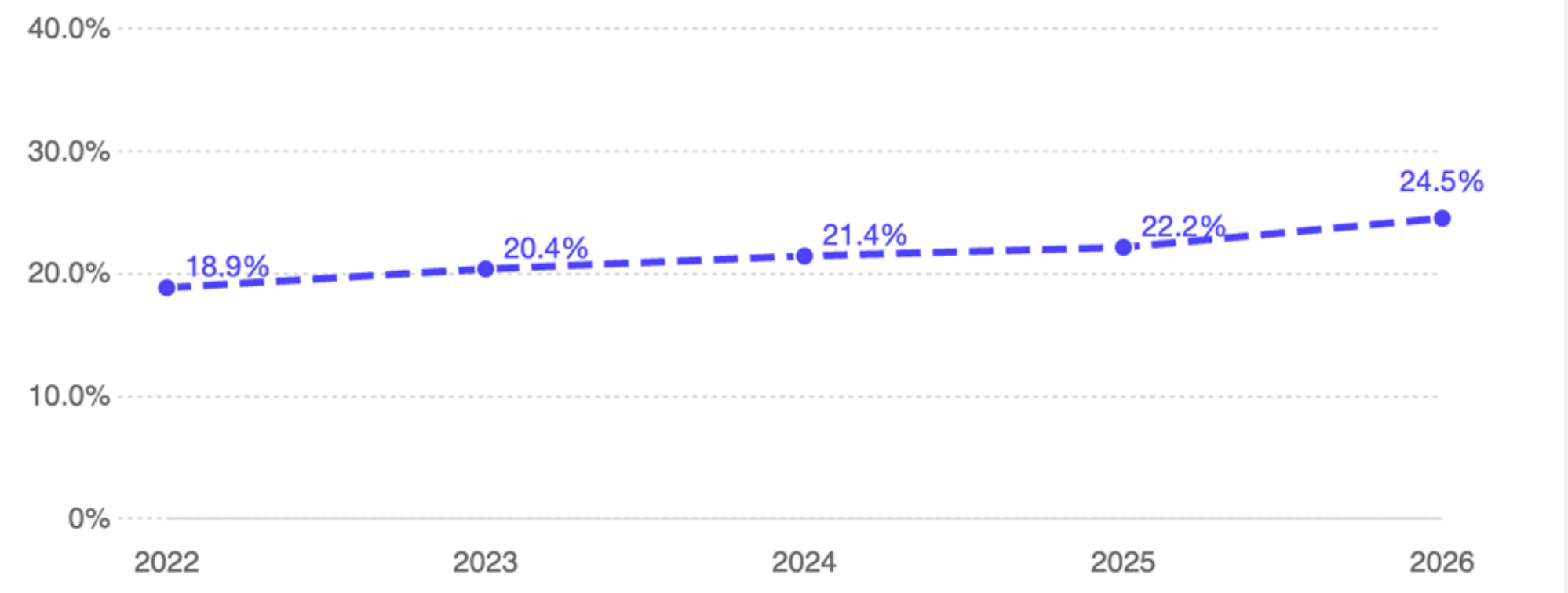
Health & Human Services

# Monthly Recurring Giving

Recurring donor value continues to hold strong as the volume of recurring donors scales.



## Percentage of Recurring Donors



**85.8%** (vs 49.1%)

Recurring Retention Rate

**1.0%** (vs 0.12%)

Recurring Donor Upgrade Rate

**WHY SHOULD I KNOW  
MY BENCHMARKS?**

## Why should I know my benchmarks?

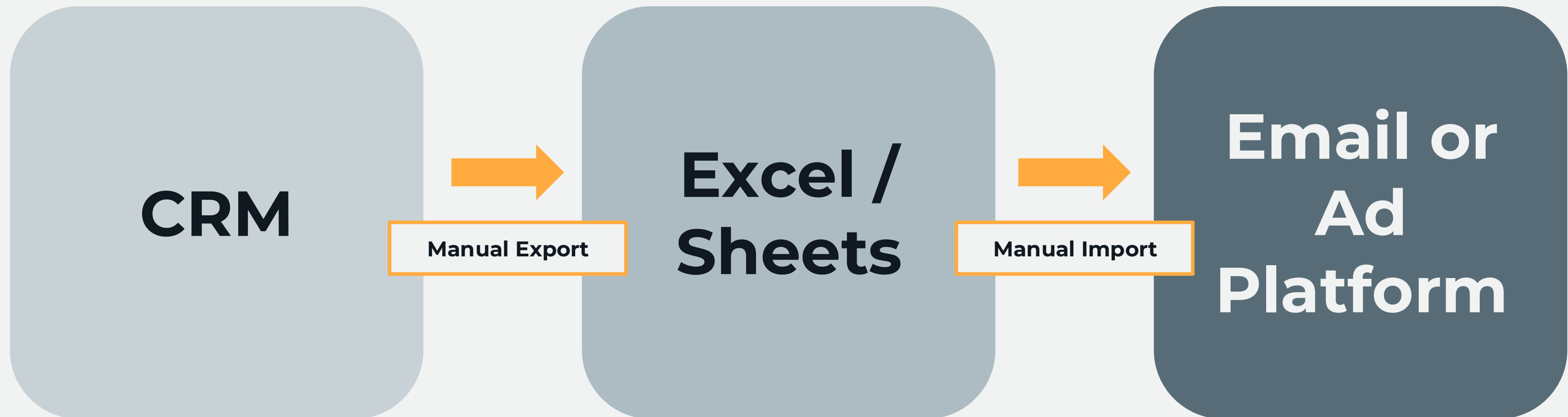
- You can't improve what you don't measure.
- Know your baseline performance.
- Benchmarks help show us where to focus.
- Every improvement starts with measurement.
- Build a strategy rooted in real performance.

**STRATEGIC NEXT STEPS I CAN  
IMPLEMENT IMMEDIATELY**

# WHAT MOST FUNDRAISING SEGMENTATION LOOKS LIKE

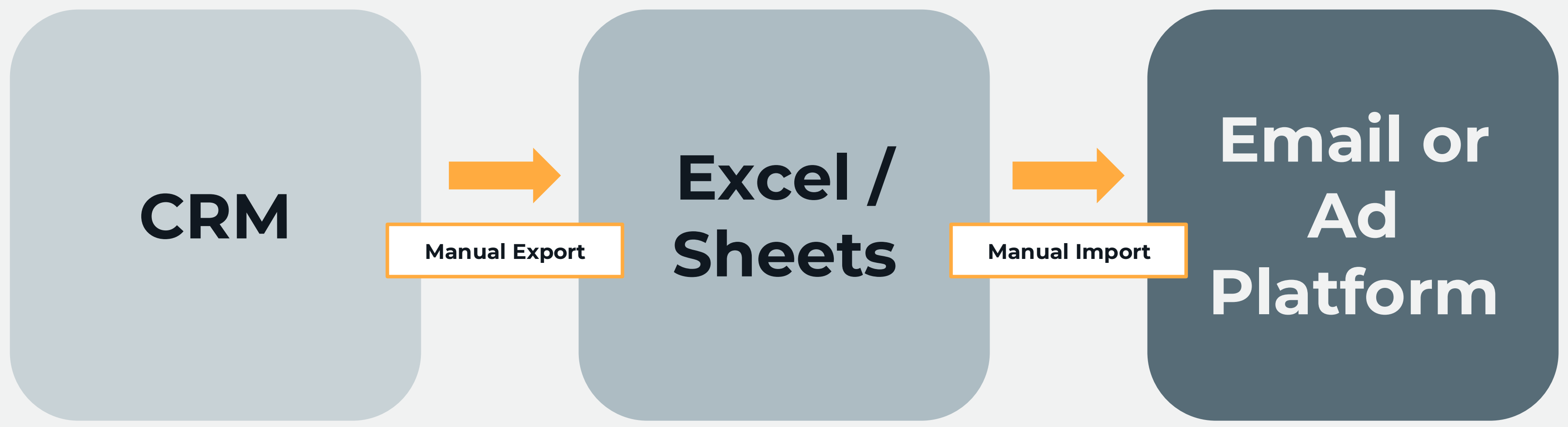
# BASIC AUDIENCE TARGETING

*Without Avid & BCA*





Wait 1 Week





**Repeat  
Every  
Week  
Forever**

Email or  
Ad  
Platform

Manual Import

1 Week

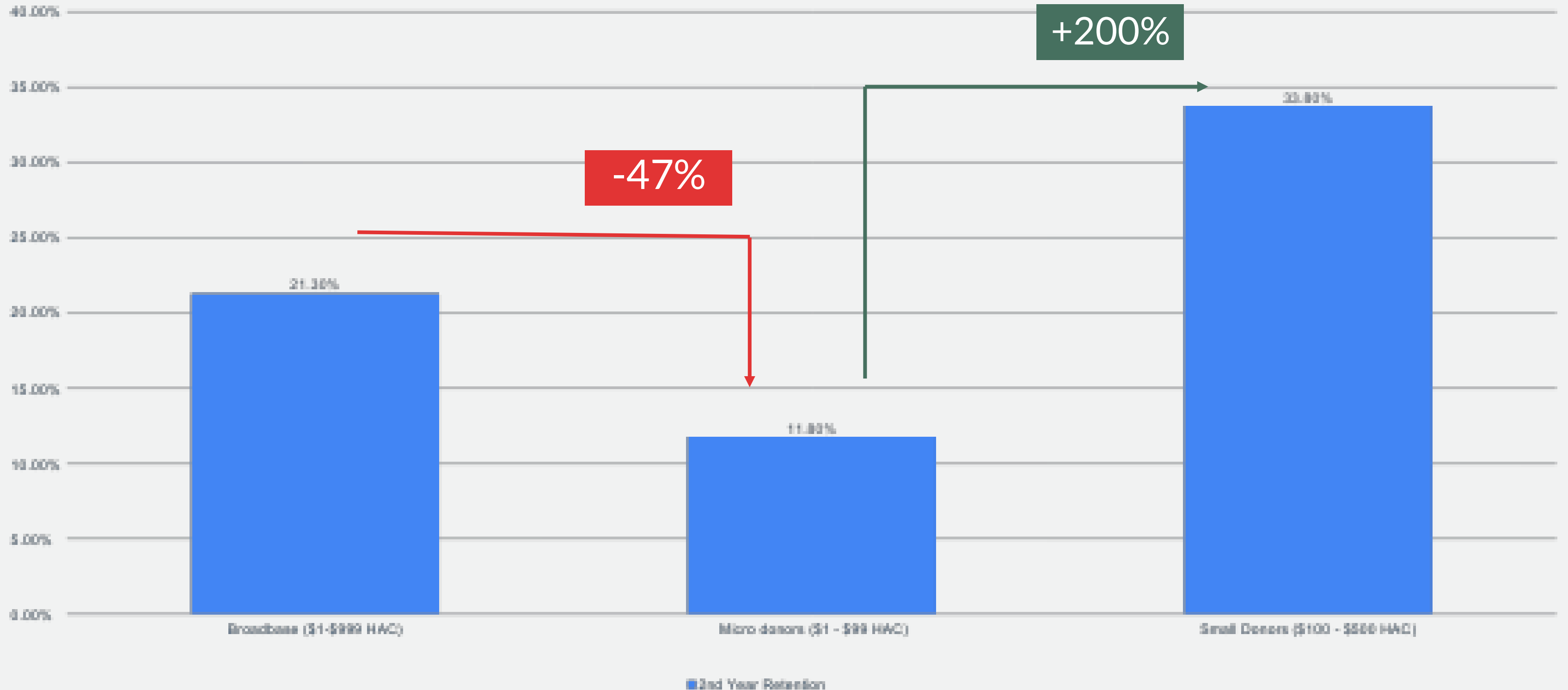
Email or  
Ad  
Platform

Manual Import

# HOW **AUTOMATION** HELPS

**HOW AUTOMATED DONOR UPGRADES LED  
TO A 200% INCREASE IN RETENTION**

# 2nd Year Retention Rate by Giving Level



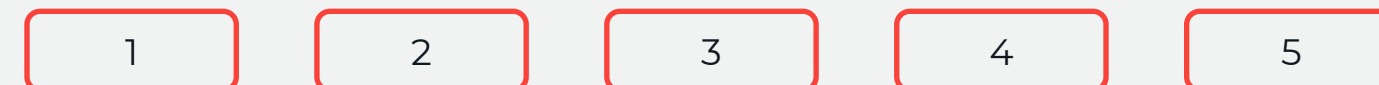
**HOW DO WE GO ABOUT UPGRADING  
OUR MICRO-DONORS TO SMALL  
DONORS?**

# AUTOMATED MICRO-DONOR UPGRADES

## PHASE 1: New Donor Welcome Series



## PHASE 2: 2<sup>nd</sup> Gift Series



## PHASE 3: Recurring Gift Automation



**Month #1:  
New Donor  
Welcome Series**

---

# Automated New Donor Welcome Series

---

## About:

Delivered through an automated email sequence, this campaign introduces new donors to the heart of your organization—who you are, what you do, and the impact their gift helps make possible.

## What to include:

### **3-5 automated emails in the series:**

Each email is purposeful: the first expresses sincere thanks and celebrates their decision to give; the next few tell powerful stories, showcase key programs, and highlight your values and vision.



**Month #2:  
2nd Gift Email  
Series**

---

# 2<sup>nd</sup> Gift Email Series

---

## About:

Delivered through an automated email sequence, this email series combines high-value content and cultivation with a direct ask.

Reiterating the impact the donor has already made with their previous gift, along with providing relevant offers, impact stories, and a soft ask.

## What to include:

**3-5 automated emails in the series over a 7-10 day period:**

By meeting subscribers in their inbox with meaningful content delivered at a predictable cadence, you build trust, foster reflection, and keep your cause top of mind.



**Month #3:  
Recurring Gift  
Series**

---

# Recurring Gift Series

---

## About:

Even your most committed supporters often need a clear invitation to deepen their involvement—and becoming a monthly donor is one of the most impactful steps they can take. Without a dedicated effort to show how recurring giving changes lives—not just outcomes—you risk leaving a powerful source of long-term support untapped.

## What to include:

**4-6 automated emails in the series over a 10-14 day period:**

The messaging emphasizes the benefits of recurring giving—convenience, greater impact, sustained programs—while affirming that the donor’s values already align with the mission. This isn’t a hard sell—it’s a well-timed opportunity to do more of what they already believe in.



# HOW **USING AI** HELPS THROUGH PATHWAYS & PLAYBOOKS



## Case Study

### **The Situation:**

Bible League spent significant budget on donor acquisition ads through Meta.

### **The Solution:**

Avid aggregated their data pushed more enriched audiences to Meta advertising.



20%

Cost to Acquire a  
New Donor



25%

New Donor  
Acquisition

# Acquisition is a Loss Leader

Savvy fundraising leaders know that the true ROI on acquisition comes in year 3+.

Faith-Based Nonprofits Avg.

\$81

Average Annual Value of a New Donor



\$214

Average Annual Value of a 2<sup>nd</sup> Year Donor



\$322

Average Annual Value of a 3+ Year Donor

*\*Based on Avid Benchmark data of 43 faith-based nonprofits representing \$1.4B in annual revenue.*

The Common Approach



Export a list of your donors



Clean your list in Excel



Upload to Meta for targeting



Modeled audience of prospects

Stage 1

Win their attention  
with advertising

eBooks · Video Series ·

Petitions

Key Question

Stage 2

Is your budget being **wasted**  
on the wrong people?

Not giveaways, but high  
value content

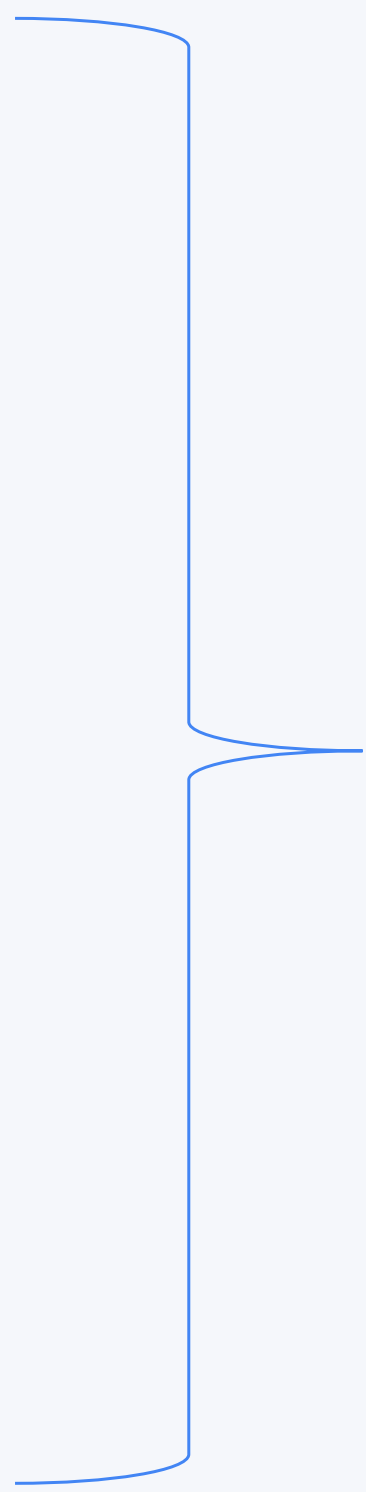
Stage 3

Capture downstream  
giving with automation

Automation · Personal  
Follow-up · Custom Asks

The More Effective Approach

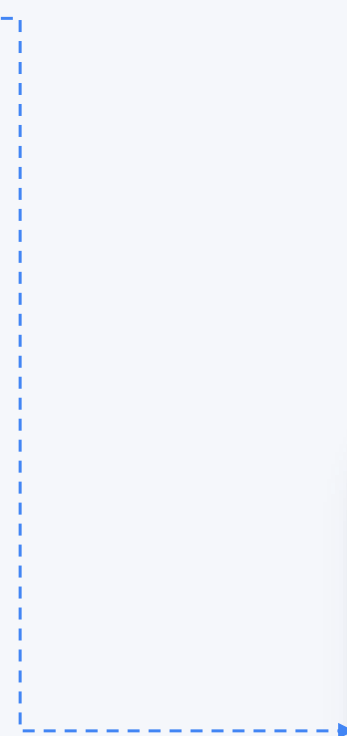
- virtuous
- FundraiseUp
- mailchimp
- Google Analytics
- Meta



**Current Donor Audience**  
Complete record of donor activity, history, and engagement.



**Modeled Donor Prospects**  
Likely new donors based on your current donor makeup.



**Limited Donor Audience**  
Donor activity, history, and engagement is limited to CRM data.



**Stale Donor Prospect Lists**  
Modeled audiences are less accurate and less effective.

Key Challenge

**Most critical donor data lives in  
siloed, disconnected tools.**



**Bible League Canada's growth was built on two capacities: a unified tech stack & automated targeting.**

A Unified Tech Stack


  
**mailchimp**  
Google Analytics  
Meta

**Current Donor Audience**  
Complete record of donor activity, history, and engagement.



**Modeled Donor Prospects**  
Likely new donors based on your current donor makeup.

# Automated Targeting

 Audience  
**Lifecycle: New Donors (Trailing 12 mo.)**  
Constituent Data Blend



Sync Frequency <b>DAILY</b>	Records <b>9,909</b> ⓘ
--------------------------------	---------------------------



 Pathway  
**Facebook Ad Manager: Avid AI**

**Refreshed Targeting**  
Likely new donors based on your current donor makeup.

**Accurate Suppression**  
Likely new donors based on your current donor makeup.

Key  
Takeaway

**A unified tech stack** makes your  
team more *efficient*—and makes  
acquisition more *effective*.



# The Revenue Impact

Forecasting Impact Using Avid's Fundraising Scorecard

# Long-Term Forecast

## Previous Growth Trajectory



**FY2026 Projections**

Based upon the adjusted metrics above, we have projected how the upcoming time period will end.

Metric	Value
Revenue	\$7.4M
Donors	8.3K
Rev / Donor	\$898



### This Year:

- \$7.4M in revenue
- 8.3k Donors

### 3 Year Outlook:

- \$7.1M growth

# Long-Term Forecast

## New Growth Trajectory



### This Year:

- \$7.6M in revenue (↑2.7%)
- 8.9k Donors (↑7.2%)

### 3 Year Outlook:

- \$10.5M in growth (↑47%)





# Implementation

Practical Steps to Lead Your Organization to Growth

## Manual Implementation

A manual implementation is possible, but it requires significant resources—and is less effective.



Requires complex data tools



Requires a human operator



Highly error prone



Takes significant time to execute

## Leverage Existing Tech

Some CRMs have tools to fulfill aspects of this strategy—but even the most sophisticated achieve subpar performance.

**Avid** VS **HubSpot**



**Avid**

**143%**

Increase in Donor Acquisition

56

# Avid

## Implement Avid for Instant Growth

Avid unifies your data & tech,  
enriches your audience  
segmentation, and  
automates targeting &  
suppression.



### **Connect Your Tools**

Pre-built integrations with AI-assisted setup for seamless data mapping.



### **Sync Your Audience**

Sync your new donor audiences automatically for better targeting.



### **Keep on Growing!**

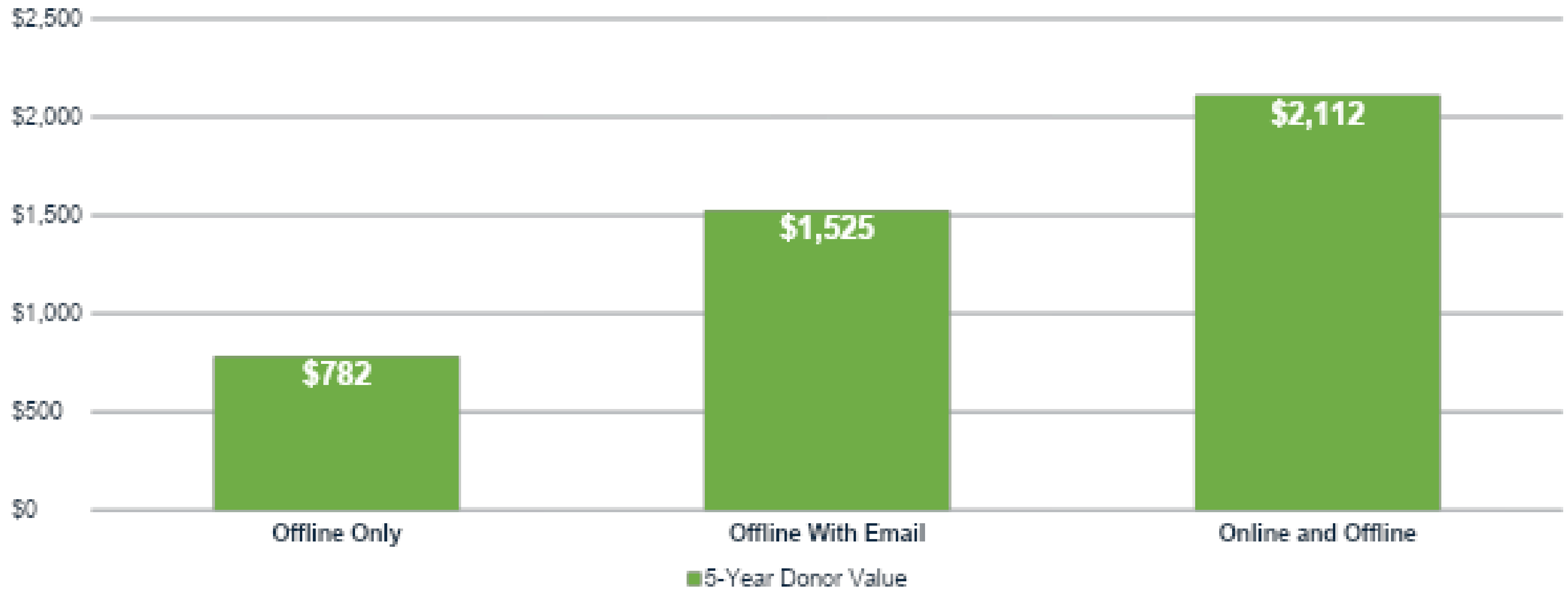
Avid keeps the momentum going, powering better execution and results.

**OTHER PLACE TO START...**

## Other places to start.

- Start with the data you do have.
- An RFM model is a simple framework using your existing data to identify your best upgrade candidates.
- Know the value of your donor channels
- Compare offline, online, and multi-channel donors. This reveals who to target and how to reach them most effectively.

# What is the value of an email address?



# Key Takeaways

- Know your data first.
- You can't improve what you don't measure — benchmarks show where to focus.
- Automation drives upgrades and retention.
- Welcome, 2nd gift, and recurring series turn one-time donors into loyal supporters.
- Target smarter with AI and propensity modeling.

**SHARE YOUR THOUGHTS.**

**ASK YOUR QUESTIONS.**

# Want a FREE \$50 Amazon gift card?



Provide your name and email address to be entered into a drawing for a \$50 Amazon gift card!

# BOOK YOUR STRATEGY SESSION

*Automating Key Fundraising Workflows*

**Book a free, 30-minute session with an Avid expert.**

- 30 minutes with an Avid Expert
- Brainstorm fundraising automation opportunities
- See a preview of how Avid can help



***[AvidAI.com/automation-strategy-session](https://AvidAI.com/automation-strategy-session)***

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**Brad Cecil** &  
ASSOCIATES

**Avid**

Thank you!

Connect with us!



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