



**SPEKTRIX**

# Recultivate Your Connection

May 20th, 2026 12pm EDT/5pm BST



# Presenters



**Sara Stevens**  
Lead Client Success  
Consultant  
she / her



**Jake Larimer**  
Consultant,  
Fundraising Specialist  
he / him



**Lucy Robinson**  
Senior Client Success  
Consultant  
she/her

PHILANTHROPY SERIES:

Fun  
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SPEKTRIX  
PHILANTHROPY SERIES

SPEKT

Stewardship  
Support  
Lasting Impact

FUNDRAISING+ SERIES BY SPEKTRIX

Fun

FUNDRAISING+ SERIES BY SPEKTRIX

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PHILANTHROPY SERIES:

Fundraising +  
Growing Your  
Revenue



## PHILANTHROPY SERIES:

# Recultivate Your Connection



WEBINAR

12:00 PM - 1:00 PM, May 20 EDT

## Philanthropy Series: Recultivate Your Connection

Register

05  
DAYS

:

18  
HRS

:

52  
MINS

:

34  
SECS

## # FUNDRAISING

Combat burnout and gain fresh ideas at our next Philanthropy Series webinar. At Recultivate Your Connection, we're taking a step back to look at new ways to spark joy for your team and your supporters.

We'll cover:

- Prospecting strategies to identify new donors
- How to build meaningful relationships with new, past, and potential donors
- New ways to give that empower donors to support you on the terms that work for them

We'll share real-life examples from Spektrix users who achieved success by taking a chance on new ways of working. We'll also look at some brand new resources we have developed to support your work.

Starting in 5 days 18 hours  
May 20, 12:00 PM EDT

Online

Organized by

Spektrix Community

Register

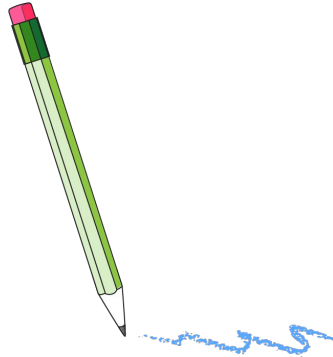
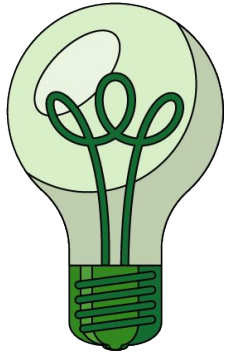
Add to calendar

Share





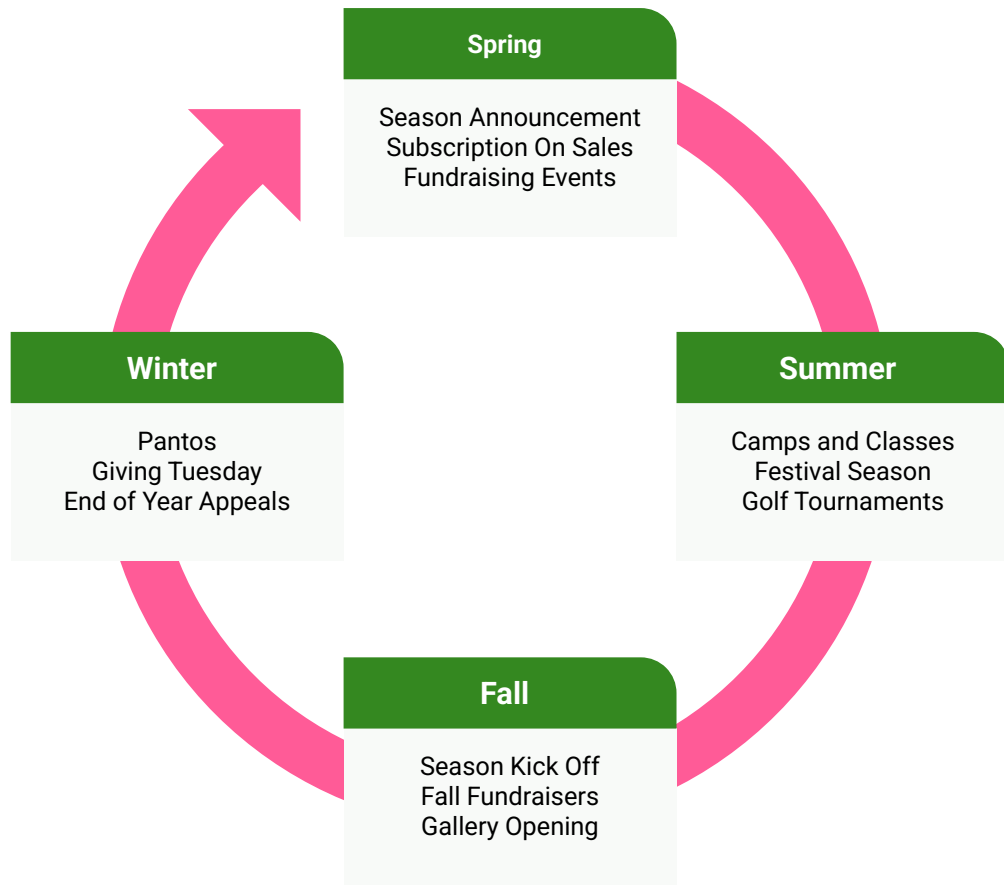
# Information





**What makes you proud to  
be a fundraiser?**







# Agenda

1

Introduction

2

3 Top Tips

3

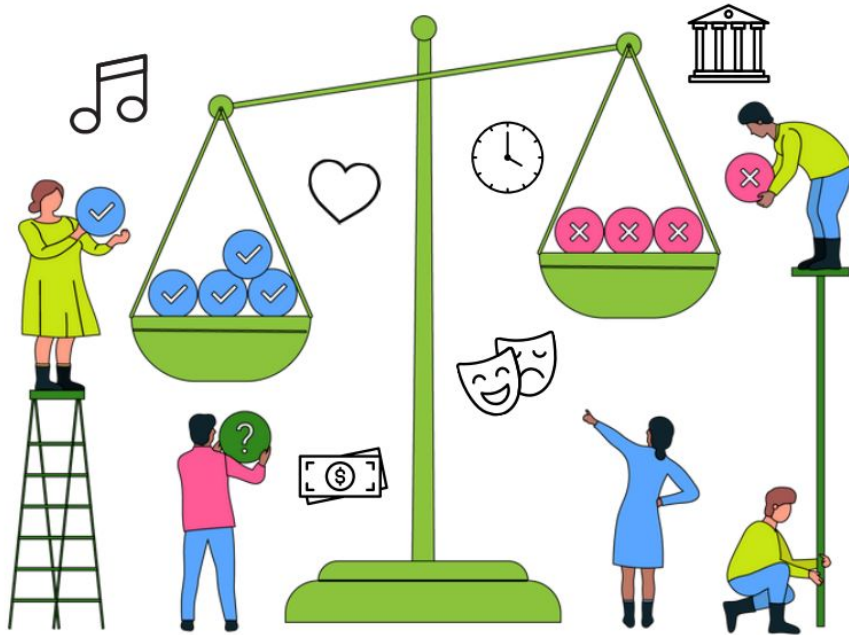
New at  
Spektrix

4

Questions

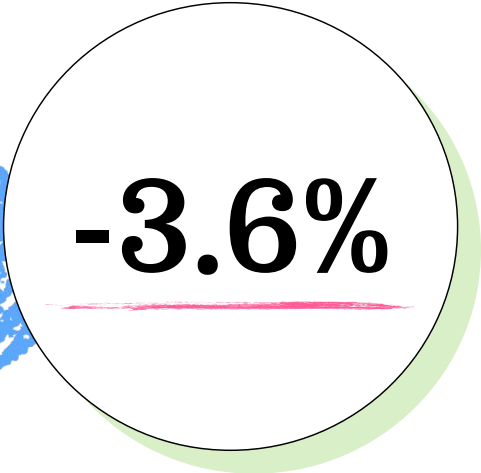


# Powered by Purpose



## Arts professionals say...

- Fundraisers are **creative** and **innovative**
- **Impact** keeps fundraisers in the sector, but resources are scarce
- Opportunities for **tech** to make work **more efficient**, but difficult to implement



**-3.6%**

**Decrease in number of donors YoY** to nonprofit organizations as of Q4 2025



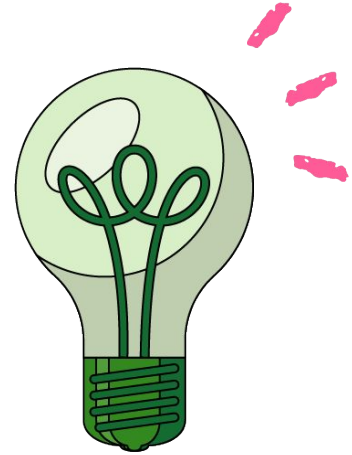
**-7.9%**

**Decrease in number of donors YoY** who last gave **less than \$100**



# Cultivating Success

- **Success follows intention**, even amid financial pressures
- **Trying something new** creates opportunities for new donors to connect with you
- Inviting past donors to **engage in new and meaningful ways** can turn the tide on attrition





# Activation & Impact

## Our Focus: Activation

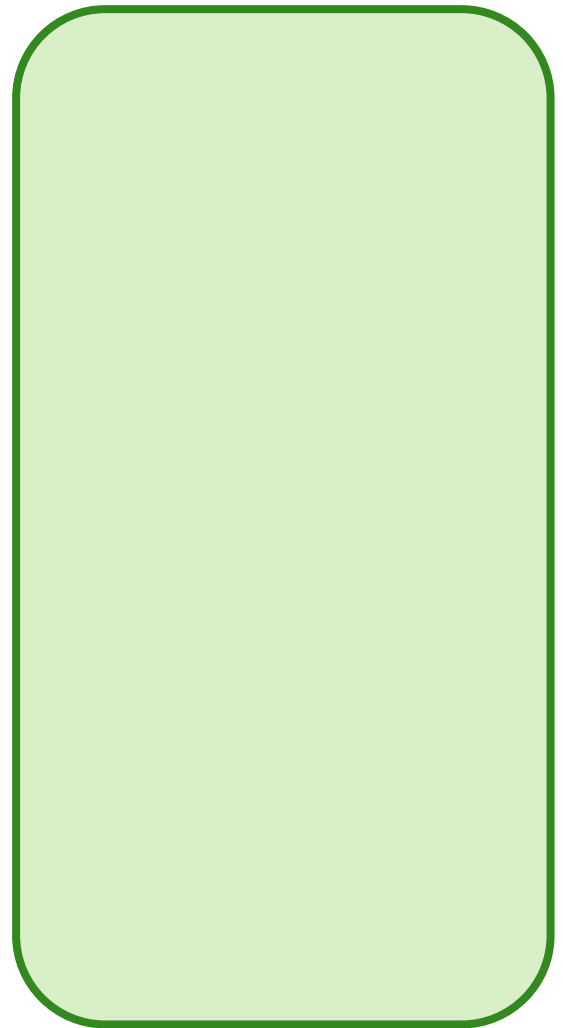
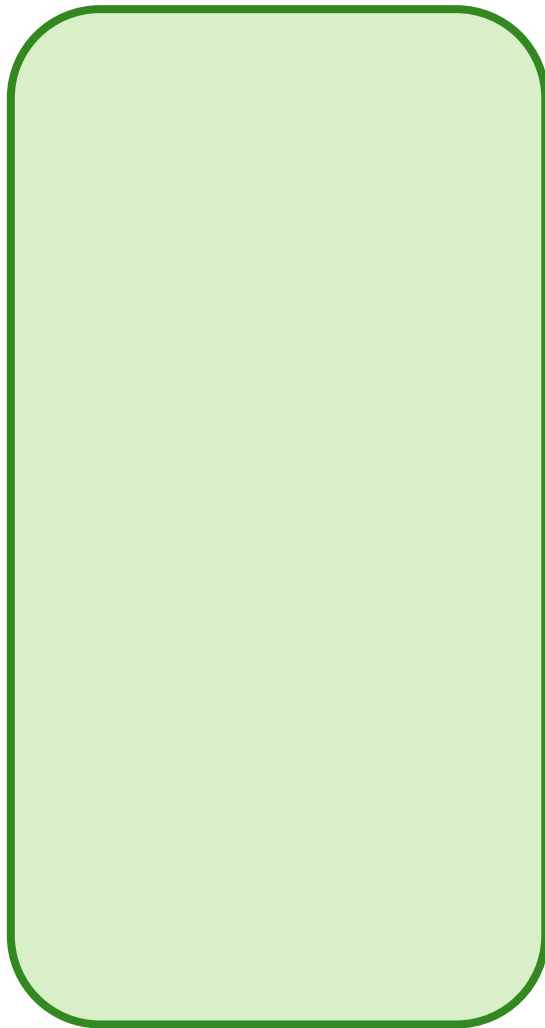
Spektrix helps you **implement technology** to best support your fundraising efforts.

## Your Focus: Pride & Impact

So you can do the impactful work, **connecting with people** and **building communities**.



**Identify  
New  
Supporters**





**Identify  
New  
Supporters**



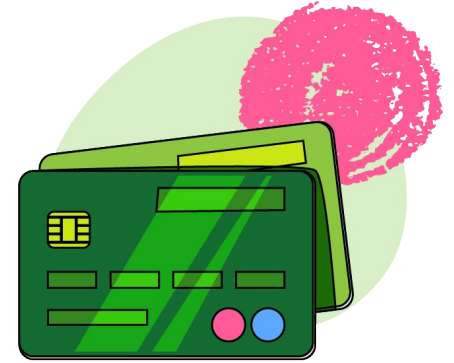
**Build  
Meaningful  
Relationships**



**Identify  
New  
Supporters**



**Build  
Meaningful  
Relationships**



**Offer New  
Ways to  
Give**



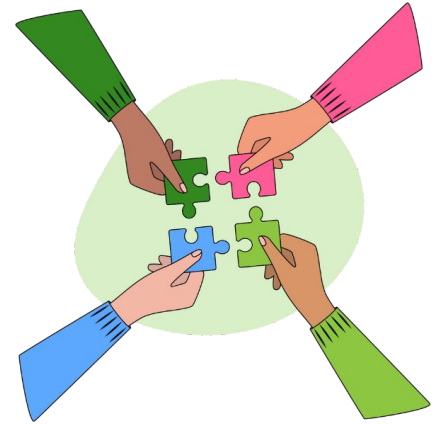
# Activation Workshops

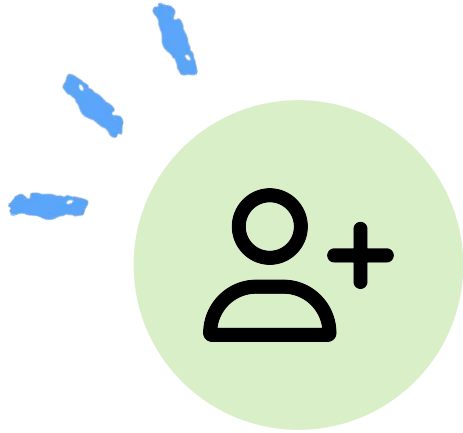
Refining Your Online Donation Ask for Previous Donors

Targeting Duplicate Customer Records

Set Up a Subsite

And more on the way!





**Identify New Supporters**



**ACTIVATION WORKSHOP:**

**Identifying Potential  
Members**

# Pattern Spotting



## Fundraising

Manual work and  
static data

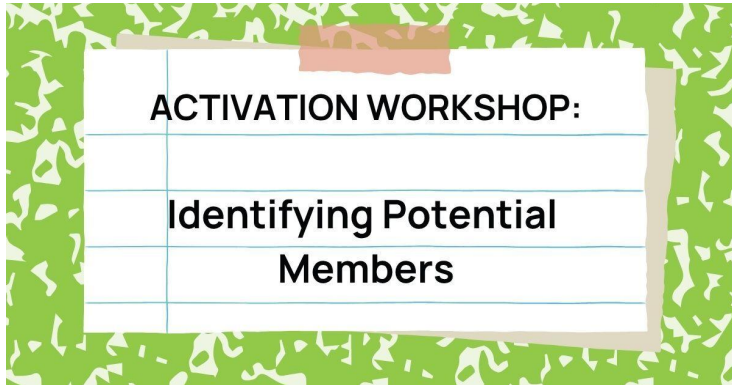
## Marketing

Lower  
engagement on  
campaigns

## Box Office

Lack of visibility  
on potential  
members

# Addressing the Gaps



**Automated Data**



**Personalized Asks**



**Team-Wide Visibility**

# > Depths of Data

Average Donation

Number of Events Booked

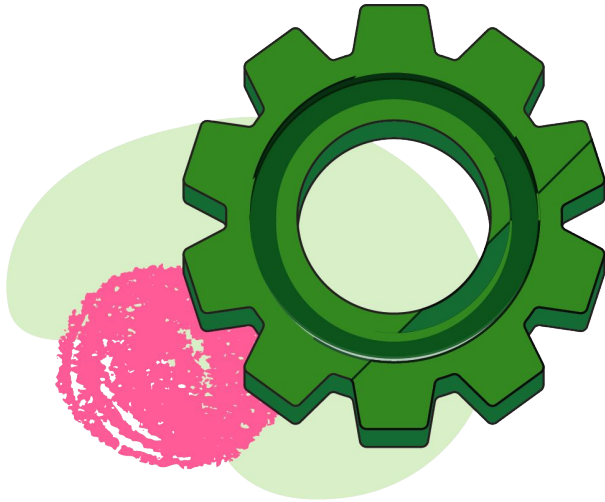


Average Spend

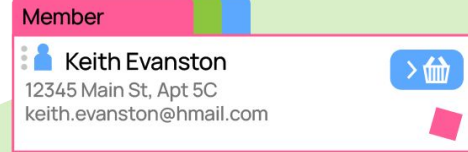
Days Booked in Advance



# Building Tools That Last



**Auto Tag**

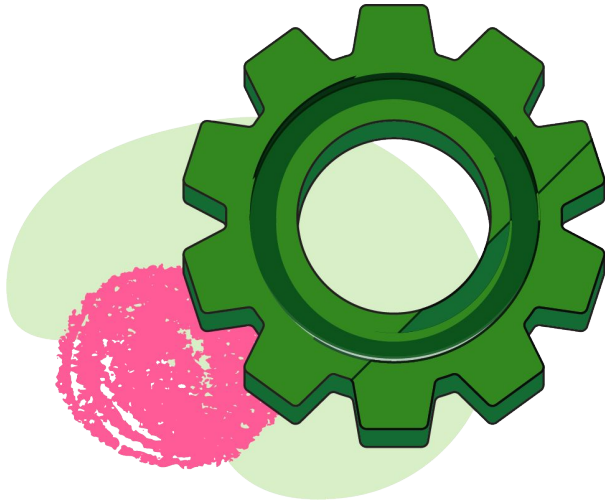


Keith & Sasha prefer aisle seats.  
Sasha has a service dog.

**Customer Group**



# Auto Tag



**1**

Spend per customer

**2**

Number of visits over time

**3**

Current membership status



# Customer Group

- Immediate visibility
- Upselling opportunities
- Surprise and delight!

Member

Keith Evanston  
12345 Main St, Apt 5C  
keith.evanston@hmail.com

>

Keith & Sasha prefer aisle seats.  
Sasha has a service dog.

Seats booked for Piano Showcase 8:00 PM

Tue 9/8/2024

2 weeks

Fri 22/7/2024

2 days

Wed 20/7/2024

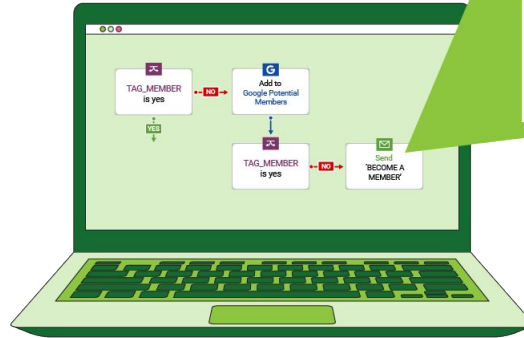
7 days

Wed 13/7/2024

Purchased popcorn & a glass of wine

Donated £50.00 to the Youth Performance Fund

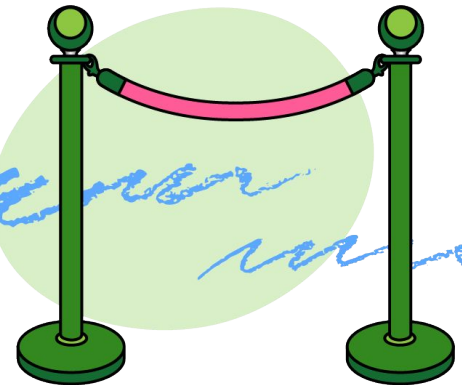
Activity: Bring to Lunch Meeting Sam Taylor



UNIVERSAL THEATRE  
**BECOME A MEMBER**

Take advantage of our special discount for new members

**JOIN NOW**





**Build Meaningful  
Relationships**

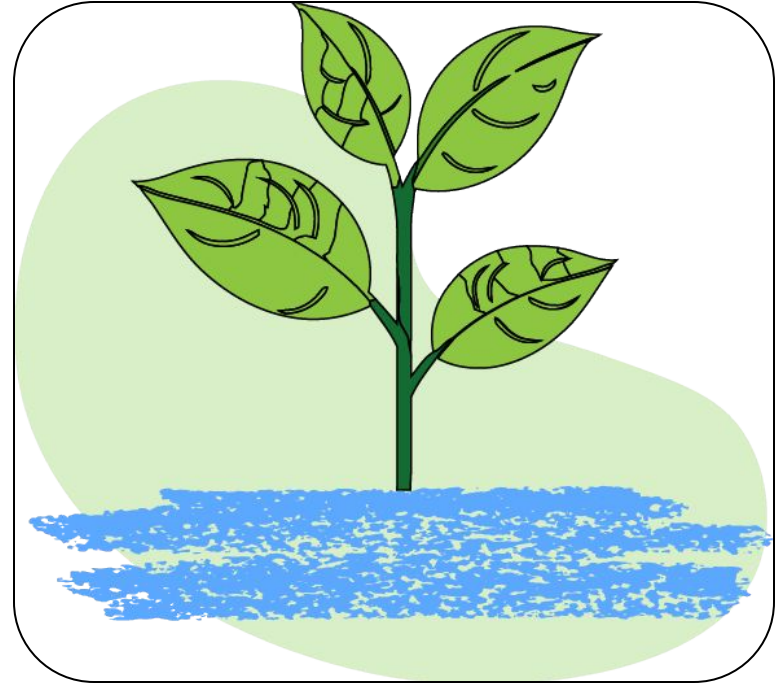


# Build Meaningful Relationships

Thinking of setting up a new  
**philanthropic giving scheme?**

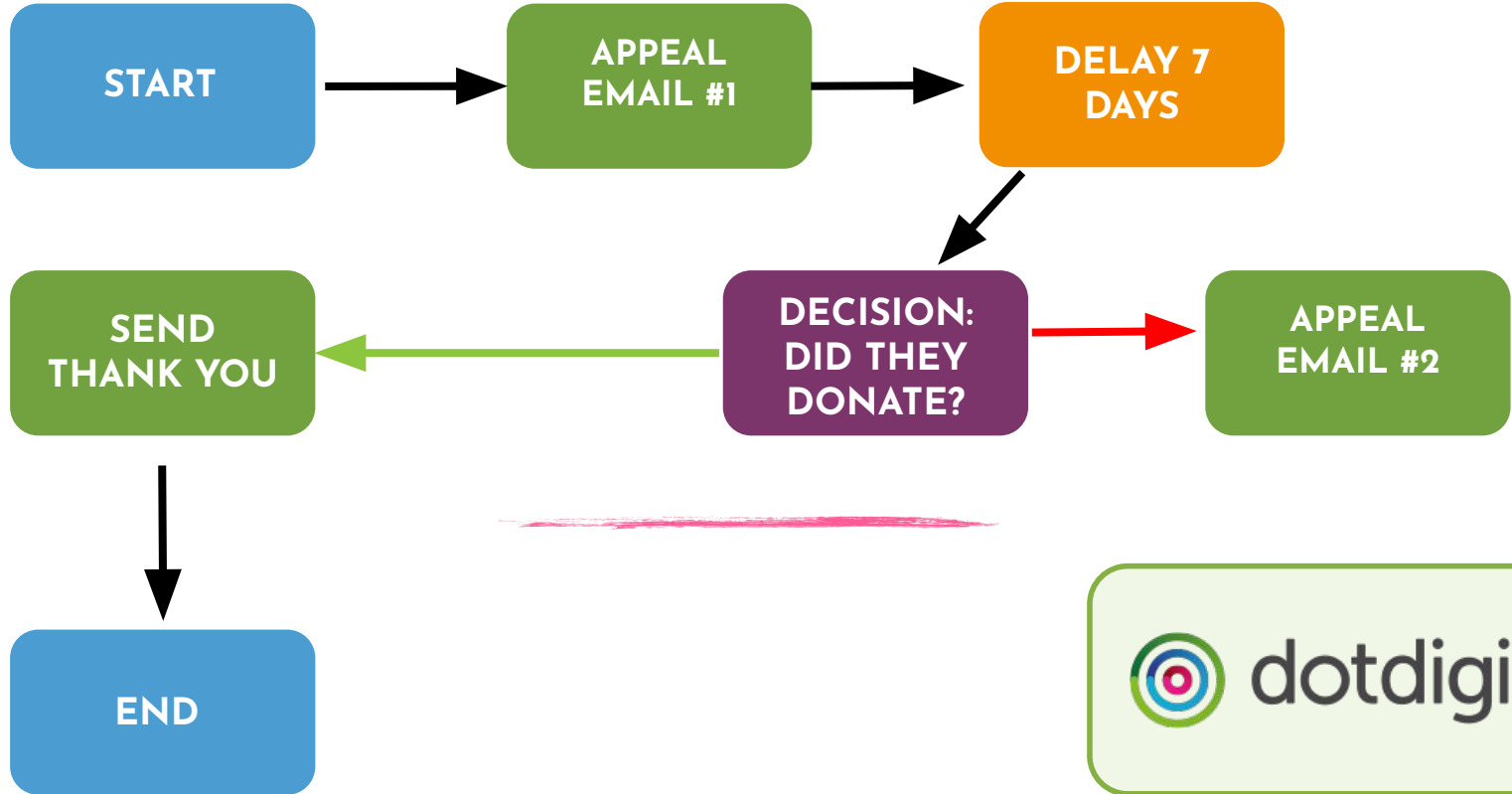
You already have the **perfect candidates** in your system

Those who have already shown  
**propensity to give**

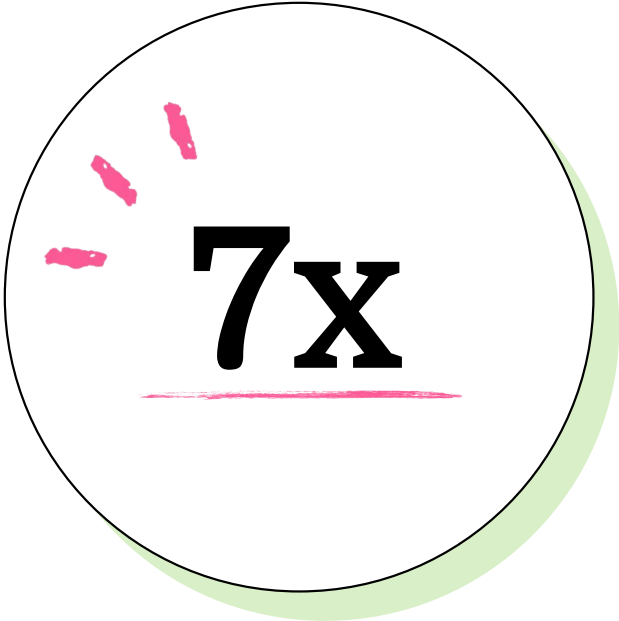




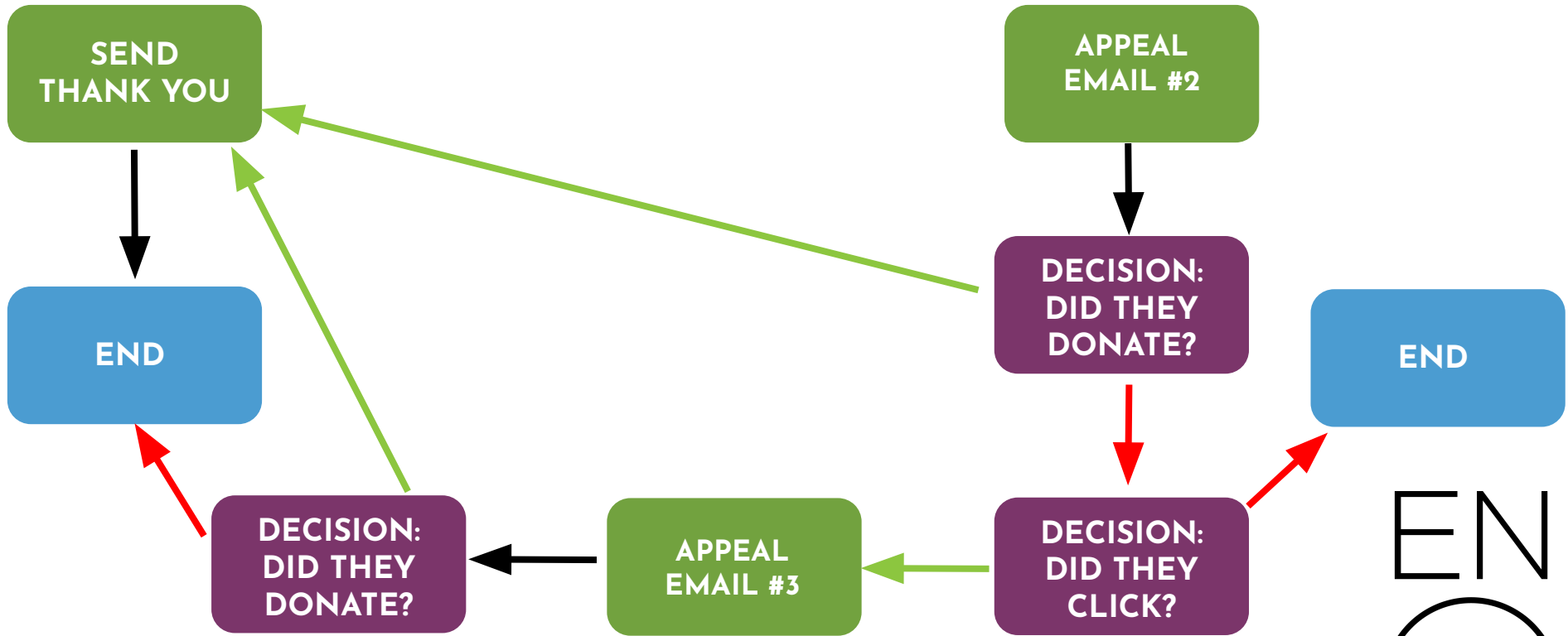
# Fundraising Appeal



Emails sent through Programs  
have



**more engagement** than one off emails!



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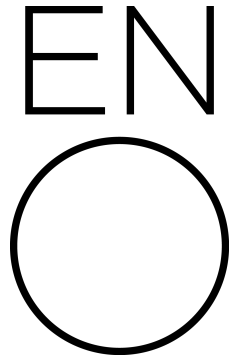


# The Power of Automation

“Dotdigital has genuinely transformed the way I work.

It saves me an enormous amount of time, looks fantastic and has made a real impact.”

Sabrina Bauer,  
Membership and Appeals Officer  
ENO and London Coliseum



BOX OFFICE

THE  
**CULTCH**

**Vancouver East Cultural Centre**



## Highlights

**26%** said they would consider leaving a legacy gift



**28%** said they would consider becoming a monthly donor



“An effective way of reaching donors on a personal level is creating a survey that takes donors on a journey.”

**Pippa Mackie**  
**Partnerships Manager**  
**The Cultch**

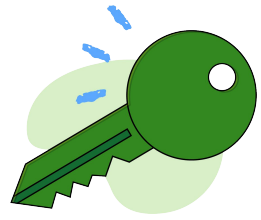
CINCINNATI  
*Shakespeare*  
COMEDY

ELM  
ERICH KUNZEL  
THE OTTO M. BUDING THEATER

CINCINNATI  
*Shakespeare*  
COMEDY

ONE WAY  
→





“Six years later, Mike remains deeply engaged as both a patron and a donor.

He’s become one of our nearest and dearest supporters—and it all started with a **simple** question:

*“Would you like to meet for coffee?”*



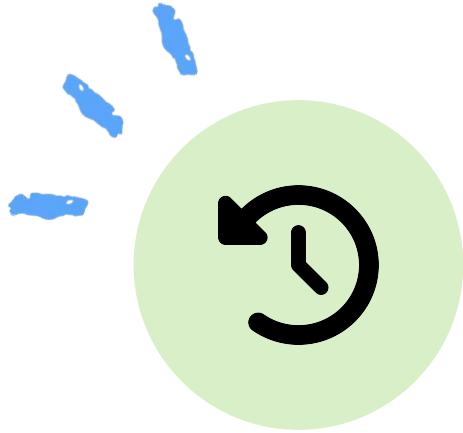
Sara Clark  
Director of Development  
Cincinnati Shakespeare Company





## **Finding new ways to share impact**

Younger donors care a lot about impact and supporting a cause they care about...They aren't giving out of obligation; they are investing in outcomes



# Enhancing Ways of Giving



# Empowering Your Frontline

- **Take the fear out of fundraising:** Equip your Box Office and Front of House teams with the confidence to make the ask.
- **Extend your ways to give:** Translate your digital campaigns into warm, in-person and phone conversations.
- **Book our 'Asking for Donations' Workshop:** Upskill your team and turn everyday interactions into genuine impact.





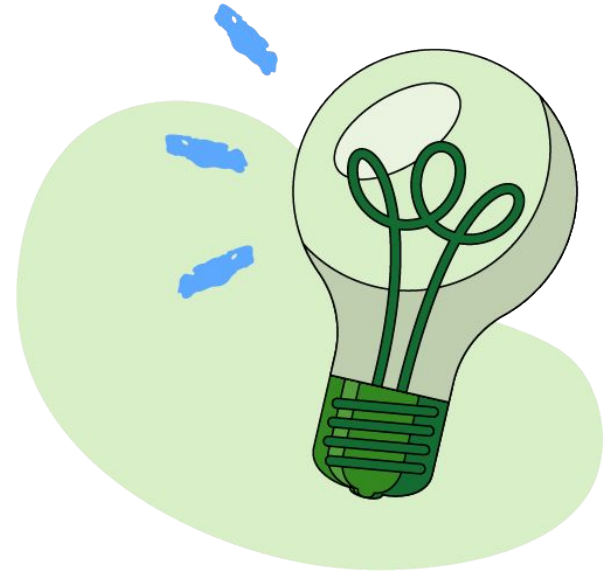
# The Power of Your Frontline

## Cultural Transformation

We completely transformed how our team feels about fundraising, moving from fear to empowerment.

## Patron Engagement

Offered patrons a chance to support something they already loved, deepening their connection.



# ➤ Variable Recurring Giving

- More choice for your donors
  - Right out of the box
  - Using Spektrix Subsite or API

## Silver Member

between \$100 - \$199

1 year

\$100

\$199

**\$100**

Lorem ipsum dolor sit amet  
consectetur adipiscing elit  
sed do eiusmod tempor incididunt ut labor...  
[Read more](#)

Automatically Renew?

Add to basket

## Highland Circles Memberships

Join Highland Circles with Gifts of \$1,500 + Make a generous investment in HVS's future with an annual gift of \$1,500 or more and help us bring Shakespeare to the widest possible audience and engage in a fresh dialogue about what is essential in Shakespeare's plays, while supporting the creation of new classics for the American Theater!

### Highland Circles: Company Circle

between \$1500 - \$2499.99

1 year

\$1500

\$2499.99



**\$1500**

#### COMPANY CIRCLE \$1,500

- Membership valid for one year
- Monthly Member Newsletter...

[Read more](#)

### Highland Circles: Actors Circle

between \$2500 - \$4999.99

1 year

\$2500

\$4999.99



**\$2500**

#### ACTORS CIRCLE \$2,500

- Membership valid for one year
- Monthly Member Newsletter...

[Read more](#)

### Highland Circles: Opening Night Circle

between \$5000 - \$9999.99

1 year

\$5000

\$9999.99



**\$5000**

#### OPENING NIGHT CIRCLE

**\$5,000**

- Membership valid for one year...

[Read more](#)



LEARN MORE ABOUT THE BENEFITS AND EXPERIENCES AT EACH MEMBERSHIP TIER

### 01 FRIEND \$100-\$499

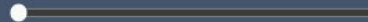
- **Members-only ticket presale** for Summer Season, Rosen House Concert Series, and Holiday Tea Musicales
- Invitation for two (2) to the annual **Friends' Garden Party**
- **Recognition** in our annual donor listing and annual report
- **Exclusive Member Discounts:**
  - 10% off Caramoor merchandise
  - 10% off on-site food and drink
  - 20% off Garden Listening tickets
  - 20% off tours of the Rosen House

1 YEAR

\$100

\$100

\$499



Auto-renew my membership

ADD TO CART

### 02 SUPPORTER \$500-\$999



+2.3%



**ACTIVATION WORKSHOP:**

**Enabling Recurring  
Donations**



Recent and Upcoming:



# New in Fundraising



# Opportunity Attributes

- Group opportunities together
- Record extra details against them.

### Edit Opportunity


 Editing opportunity for Selena Gomez. 

**Campaign:** FY 25 > Individual Giving

**Description:**

**Owner:** jlarimer

**Current Stage:** Ask

**Expected Close Date:** 10/31/2026 

**Target Amount:** \$ 1,500.00

**Asked Amount:** \$ 2,500.00

**Likelihood Of Success:**  Default for this stage (50%)  
 Custom:  %

**Closed:**

**Sponsorship:** Next to Normal



# Campaign Attributes

### Select Campaigns

Filter by Name:

**Campaigns to choose from**

Include Inactive Campaigns

- FY 23 > Corporate Giving
- FY 23 > Corporate Giving > Matching Gifts
- FY 23 > Corporate Giving > Sponsorships
- FY 23 > Special Events
- FY 23 > Special Events > Other Events
- FY 23 > Special Events > Special Events - Sp
- FY 23 > Special Events > Spring Gala - Auction
- FY 23 > Special Events > Spring Gala - Ticket
- FY 23 > Trusts & Foundations
- FY 25
- FY 25 > Individual Giving > Year End Appeal
- FY 25 > Special Events
- FY 25 > Special Events > Fall Gala - Auction
- FY 25 > Special Events > Fall Gala - Paddle R
- FY 25 > Special Events > Fall Gala - Tickets

**Selected Campaigns:**

include the following campaigns:

- Capital Campaign > FY 21 > Individual
- Capital Campaign > FY 22 > Individual
- Capital Campaign > FY 23 > Individual
- Capital Campaign > FY 24 > Individual
- Capital Campaign > FY 25 > Individual
- FJT FY 2024 > Individual
- FJT FY 2024 > Individual > Add Ons
- FJT FY 2024 > Individual > Membership
- FJT FY 2024 > Individual > Naming Opportun
- FJT FY 2024 > Individual > Restricted to
- FJT FY 2024 > Individual > Special Events (Fi
- FJT FY 2024 > Individual > Underwriting
- FY 21 > Individual
- FY 21 > Individual > Annual Fund
- FY 21 > Individual > Board
- FY 21 > Individual > Master Passes



# Campaign Attributes

**Name** Board

**Start Date** 7/1/2024

**End Date** 6/30/2025

**Campaign code** FY25BD

**Target Amount** \$75,000.00

**Inactive**

**Budget Stream:** Individual

## Edit criteria

Criteria

Criteria set name:   Read only

Only show commonly used criteria

Campaigns

Campaigns with

**Campaign Attributes**

Contains all of: Budget Stream is exactly Individual



AND

Drop to add to criteria



# PatronSend



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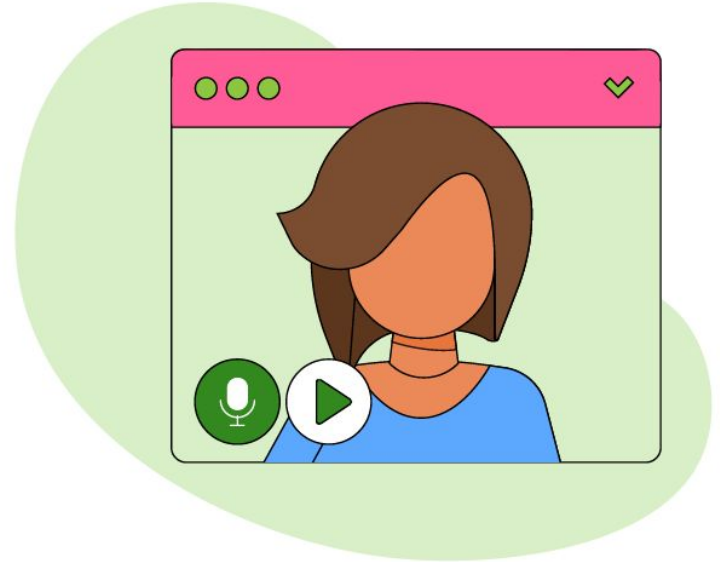
## Automated Tax Receipts

- IRS and CRA Compliant
- Automation at your own pace
- Editable in real time
- Cumulative Receipts come Year End



# Fundraising Instructor Led Training

- 90 minute sessions
- Live Q&A with experts
- Hands on Spektrix
- Network with Peers
- Scheduled Weekly Sessions





# New Features at Spektrix



 **UK & Ireland**

 June 3rd

 3pm BST

**US & Canada** 

June 9th 

2pm ET 



**MANCHESTER**



**EDINBURGH**



**LONDON**



**DENVER**



**NEW YORK**

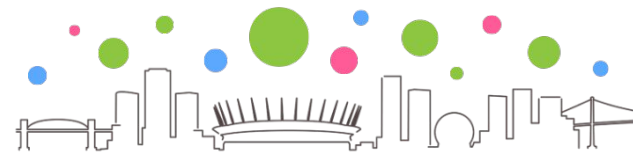


**CHICAGO**

**SPEKTRIX**   
**HUBS 2026** 



**TORONTO**



**VANCOUVER**

**SPEKTRIX** 

# HUBS 2026



**MANCHESTER**

Tuesday, 2 June  
Tuesday, 8 September  
Wednesday, 9 September



**EDINBURGH**

Thursday, 4 June  
Tuesday, 6 October



**LONDON**

Tuesday, 16 June  
Wednesday, 17 June  
Tuesday, 22 September  
Wednesday, 23 September



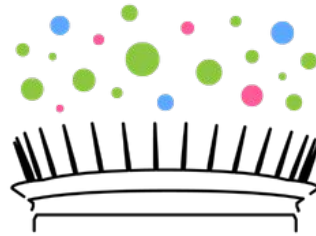
**NEW YORK**

Tuesday, July 28  
Wednesday, July 29  
Wednesday, October 21



**DENVER**

Tuesday, June 23



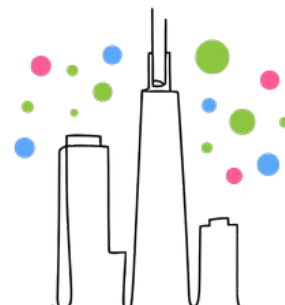
**VANCOUVER**

Monday, August 17  
Tuesday, August 18



**TORONTO**

Thursday, August 20



**CHICAGO**

Friday, October 23

# > Key Takeaways

1

Connect to the parts of your work that make you **proud**

2

Don't be afraid to try **new** things

3

Let Spektrix **support** you



**ACTIVATION WORKSHOP:**

**Enabling Recurring  
Donations**

**ACTIVATION WORKSHOP:**

**Refining Your Online  
Donation Ask For  
Previous Donors**

**ACTIVATION WORKSHOP:**

**Set Up a  
Subsite**

**ACTIVATION WORKSHOP:**

**Identifying Potential  
Members**

**And more!**

Casual Conversations	Community Questions &...	Fundraising & Donations	Jobs and Opportunities	Marketing & Communications	Reporting & Insights
Strategy & Leadership	System Setup & Tools	Ticketing & Events	Websites	What's New at Spektrix	

See all

Pinned

- Spektrix Community FAQ** Like | Comment
- Spektrix Community Guidelines** Like | Comment | 7
- Spektrix Community Moderation Guide for Members** Like | Comment | 2

Hot New

All

Create a post

Me

**Sara Stevens**  
Lead Client Success Co...

- My posts >
- My comments >
- Watching >

Community rules

- No Offensive Content
- No Spam or Advertising
- No Illegal Activity
- Be Respectful



**Questions?**



SPEKTRIX



**Thank You!**