



**Building a Balanced Revenue Portfolio:
Unlocking New Revenue Channels**

Stratus**LIVE**



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AGENDA

- Current Nonprofit Challenges
- Benefits of Revenue Diversification
- Revenue Diversification: By the Numbers
- Potential Drawbacks
- Where to Begin
- Revenue Diversification Strategies

CURRENT NONPROFIT CHALLENGES

Declining
Charitable
Giving

Workforce
Crisis

Rapid
Technological
Advancements

Changing
Donor
Preferences

- Policy Changes
- Economic Instability
- Inflation
- Environmental Disasters
- Pandemics

WARNING

WARNING

WARNING

WARNING

WARNING

THE BENEFITS OF REVENUE DIVERSIFICATION



- Increased Programmatic Flexibility
- Stability and Risk Mitigation
- Innovation and Growth Opportunities
- Long-term Sustainability
- Deepened Community Integration



REVENUE DIVERSIFICATION BY THE NUMBERS

56%

Of nonprofits have at least six distinct funding sources

28%

Of nonprofits report 10 or more revenue streams

90%

Of large nonprofits generate total revenue from one dominate revenue source

POTENTIAL DRAWBACKS OF REVENUE DIVERSIFICATION

- Brand Impact
- Resource Strains
- Gap in Skill Sets



WHERE TO BEGIN WITH REVENUE DIVERSIFICATION



Analyze your current revenue mix.

Break down existing revenue sources and determine how much each stream contributes to total funding.

Assess internal strengths and skillsets.

Identify adjacent strategies that build on existing capabilities.

Create a strategic plan with SMART goals.

- Set revenue targets
- Allocate internal resources
- Build a timeline
- Start with a pilot program
- Evaluate and refine

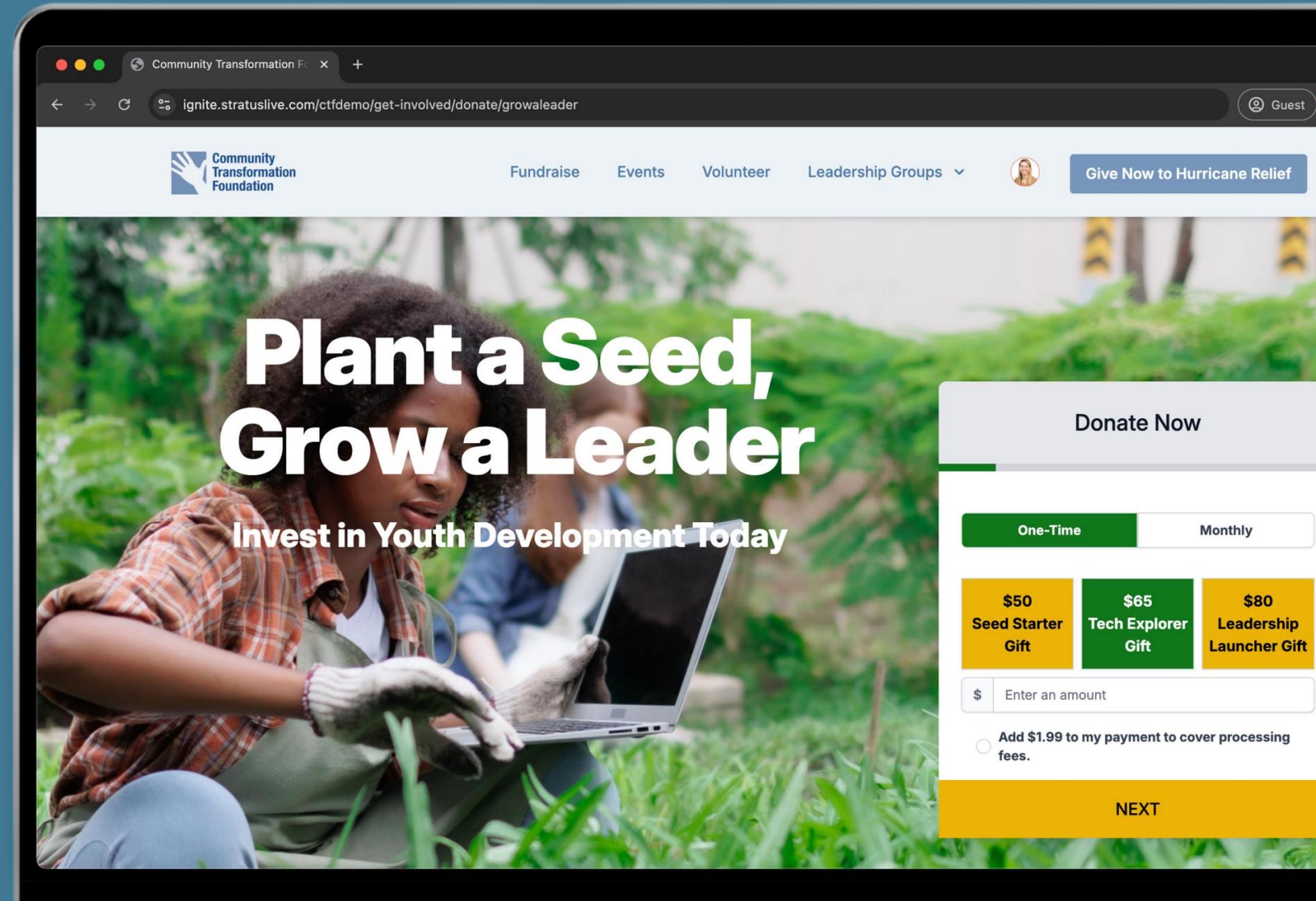
NONPROFIT REVENUE DIVERSIFICATION STRATEGIES



INDIVIDUAL GIVING

Creating and engaging a broad donor network provides a strong financial base.

- Targeted Campaigns based on Segment
 - Demographics
 - Engagement History
 - Giving History
 - Giving Channel
 - Cause interest and designations
 - Engagement Score
- Branded engagement pages for creative, timely campaigns
- Empower donors with designation options



MAJOR AND PLANNED GIVING

Build long-term sustainability through relationship building with high networth individuals.

- Identify prospects through:
 - Wealth screening tools
 - Internal data and outside research
- Build legacy societies and formal recognition programs
- Utilize automations/business process flows for gift officer workflows
 - Identification
 - Cultivation
 - Solicitation
 - Stewardship
- Leverage relationship mapping and householding

The screenshot displays the StratusLIVE software interface for a contact named Scott Armstrong. The interface includes a sidebar with navigation options like Home, Recent, Pinned, My Work, and Constituents. The main content area shows a summary of the contact's prospect research, including active prospect stages, ratings, assets, and transactions.

Active Prospect Stages

Contact	Account	Prospect Stage	Prospect Type	Start Date	End Date
Scott Armstrong	---	Prospect	Major Gift	6/2/2022	---

Active Ratings

Contact	Rating	Rating Type	Rating Source	Inclination	Readiness	Start Date
Scott Armstrong	\$50K - \$100K	Capital giving	Internal	High	Ready to Give	5/1/202
Scott Armstrong	<\$10,000	Annual giving	Internal	High	Ready to Give	1/4/202

Active Assets

Asset Name	Account	Contact	Asset Type	Asset Value	Numl
Scott Armstrong : Property-Rea	---	Scott Armstrong	Property-Real Estate	\$2,150,000.00	
Scott Armstrong : Property-Rea	---	Scott Armstrong	Property-Real Estate	\$2,298,700.00	

Other Philanthropy Associated View

Name	Amount
Scott Armstrong : Peterson Air & Space Museum	\$10,000

Active Transactions

Contact	Account	Payment Method	Transaction
Scott Armstrong	---	Check	Pa
Scott Armstrong	---	Cash	Pa
Scott Armstrong	---	Check	Pl
Scott Armstrong	---	---	So

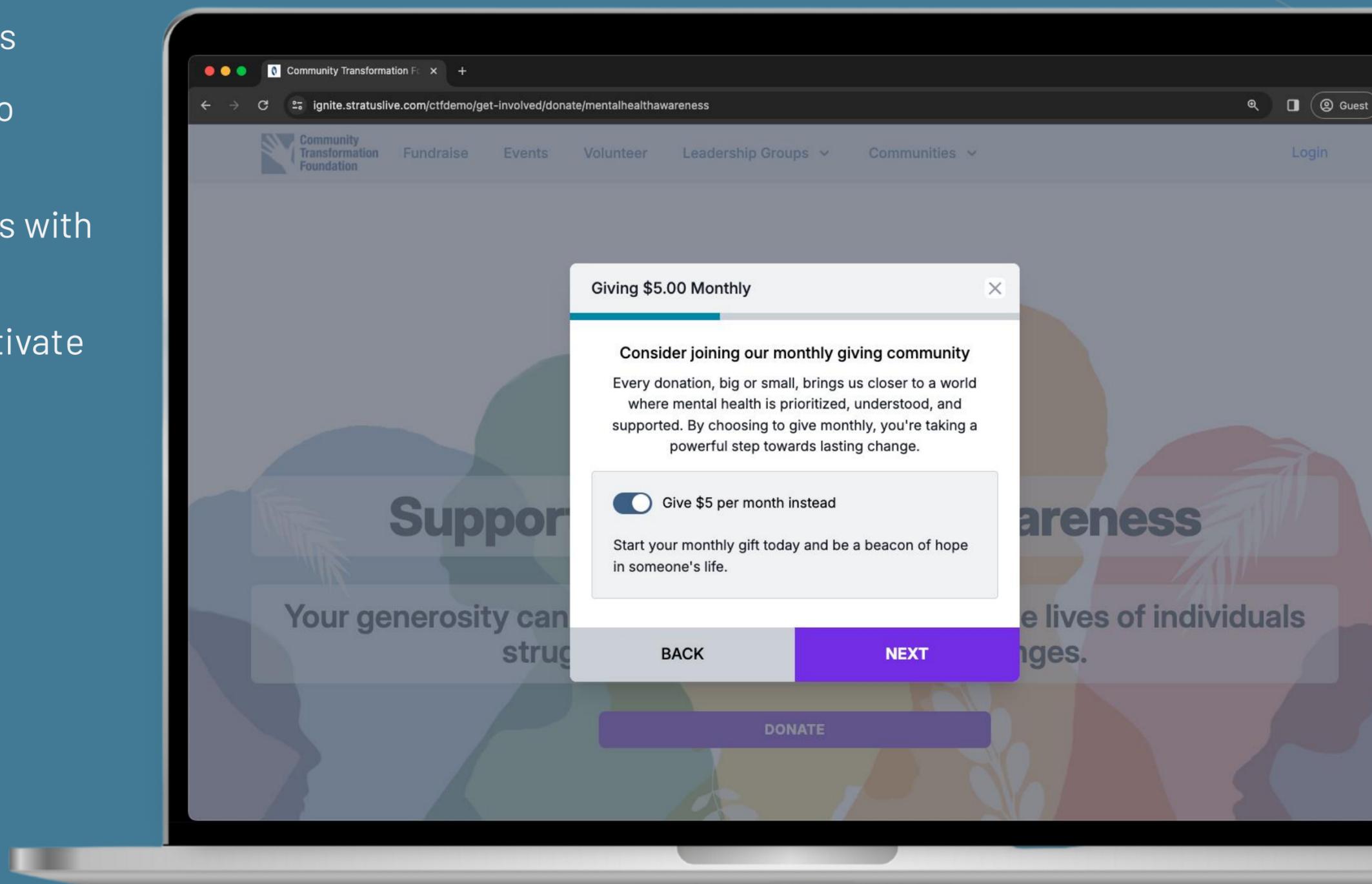
Active Media

Name	Source Na...	Media Type
Local Aerospace Colorado ...		Newspaper

RECURRING GIVING

Generate reliable funding from a loyal and passionate supporter group.

- Offer giving forms with installment options
- Utilize **upsell to recurring giving widget** to convert one-time gifts into recurring
- Launch branded recurring giving programs with consistent, personalized messaging
- Use engagement scoring to identify & cultivate midlevel & occasional donors to recurring

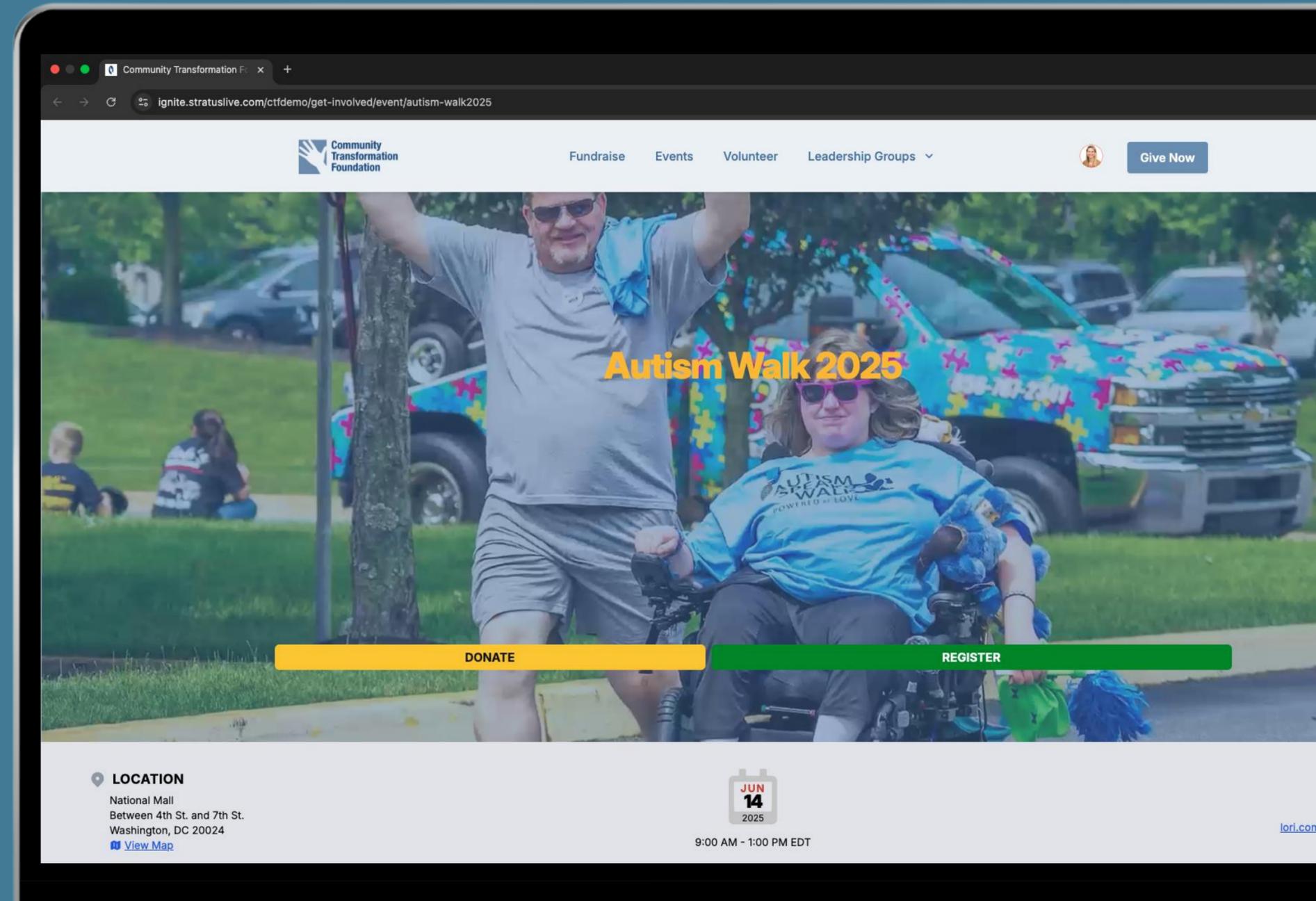


EVENTS



Raise funds, build community, and increase impact through integration with broader fundraising strategy.

- Offer a mix of virtual, in-person, and hybrid experiences
- Include ticketing, donation, and P2P/DIY add-ons
- Ensure CRM integration of attendees & guests
- Personalize post-event journeys via donor profiles

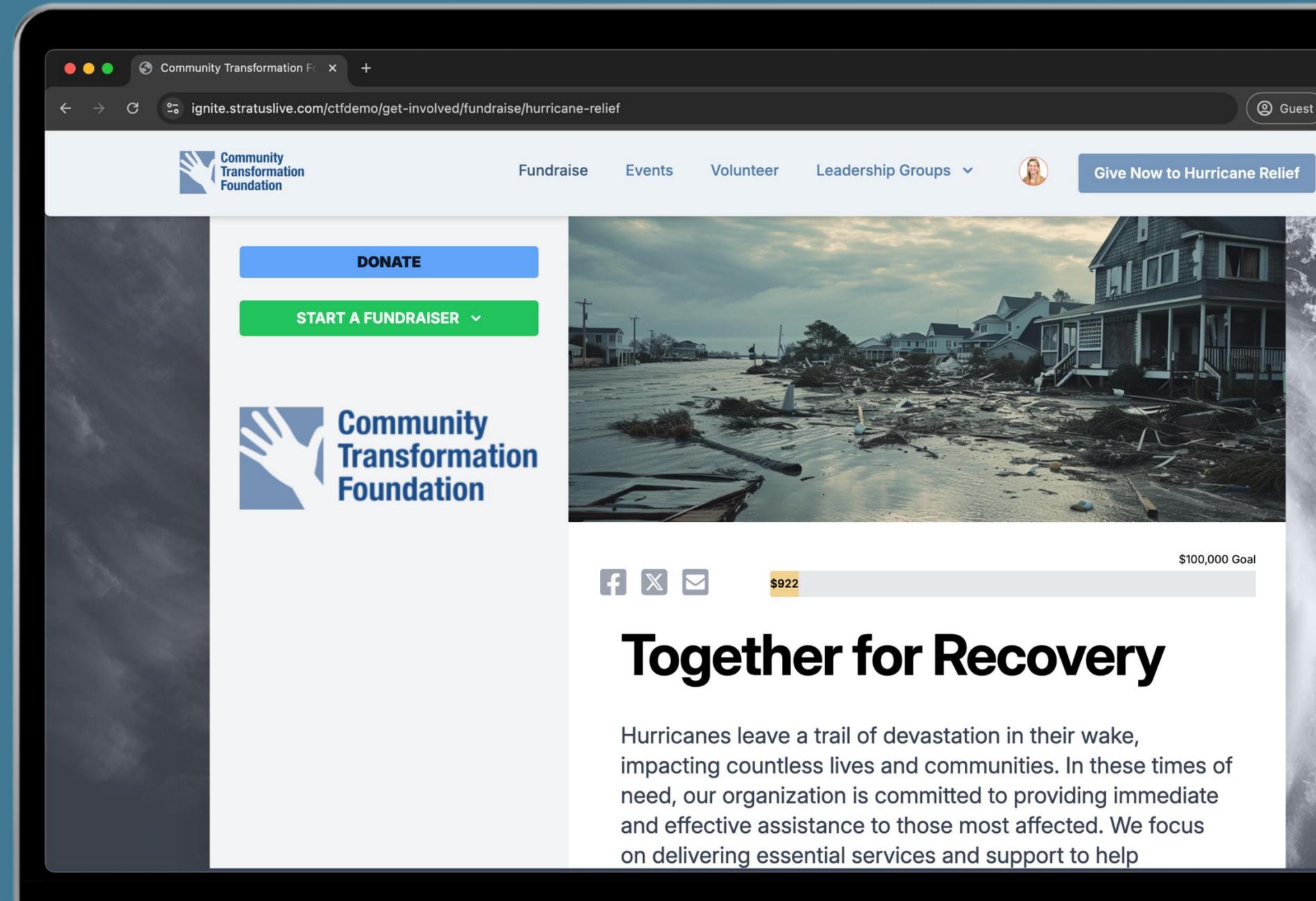


DIY AND TEAM FUNDRAISING



Leverage the power of your donors' networks.

- Easily build upon events and other digital campaigns
- Provide social sharing options for easy promotion
- Encourage team-based fundraising for an interactive experience

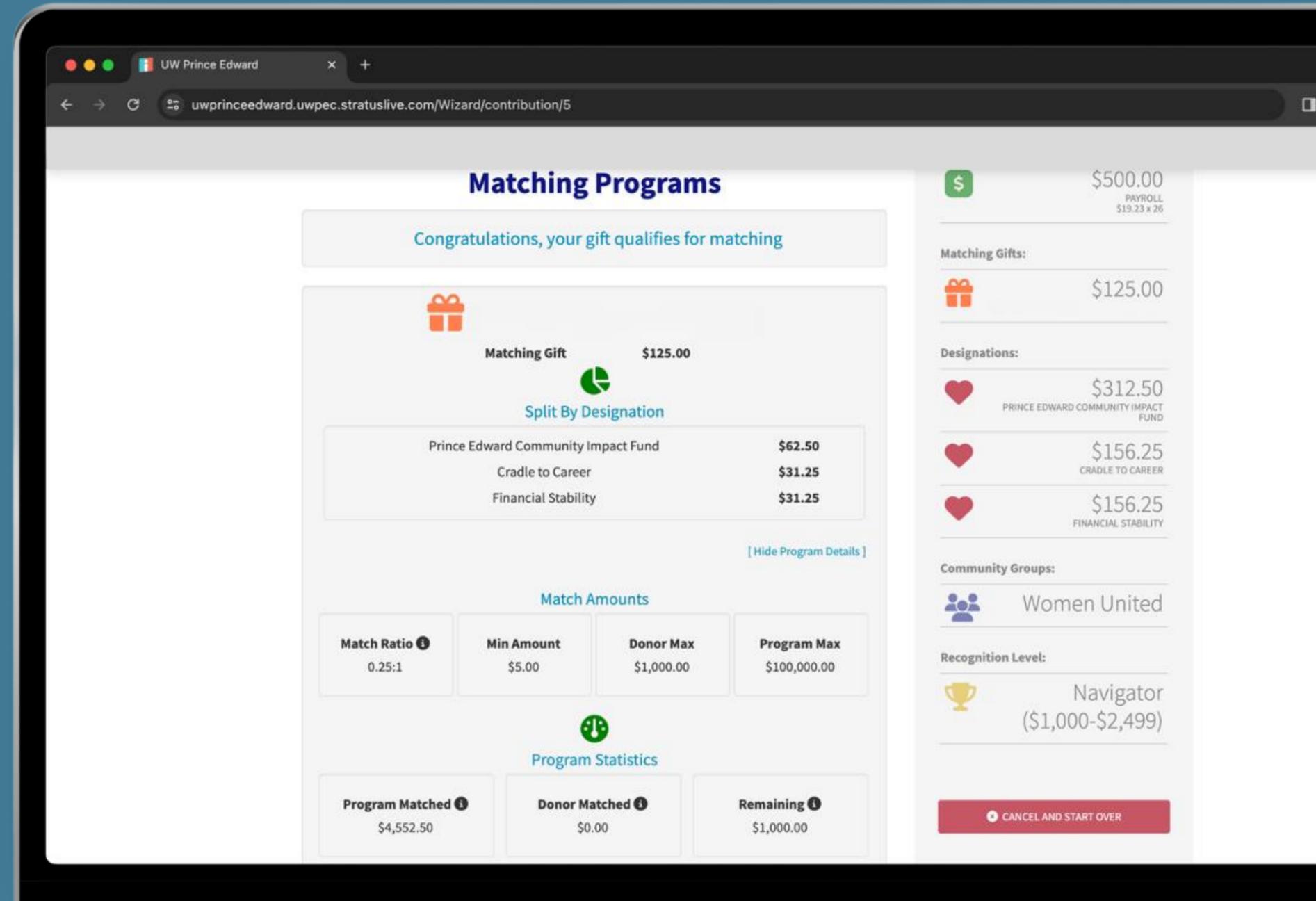


CORPORATE PARTNERSHIPS



Drive strategic growth potential through your corporate relationships.

- Matching gift programs
- Event sponsorships
- In-kind support
- Corporate grants



GRANTS



Support mission-aligned innovation with stable funding.

- Offer the opportunity to focus on program innovation or pilot initiatives
- Multi-year funding provides stability
- Support from valued institutions enhances credibility
- Track progress via CRM workflows
 - Prospecting
 - Submission
 - Reporting
- Task and activity management

Income Advancement Grant

Grant

Grant Business Process Fl...
Active for 11 months

Research Grant

Apply For The Grant

Grant Writing Details

Follow Up

Process

Summary Timeline Related

Grantor

Name * **Income Advancement Grant** Account American Express

Grant Number **0000033** Status Reason **Awarded - Processed**

Fund Income Advancement Fund Submission Method **Mail**

Campaign Period 2025

Campaign Information

Opportunity * AmEx Grant Campaign Annual Ca...

Grant Type or Code

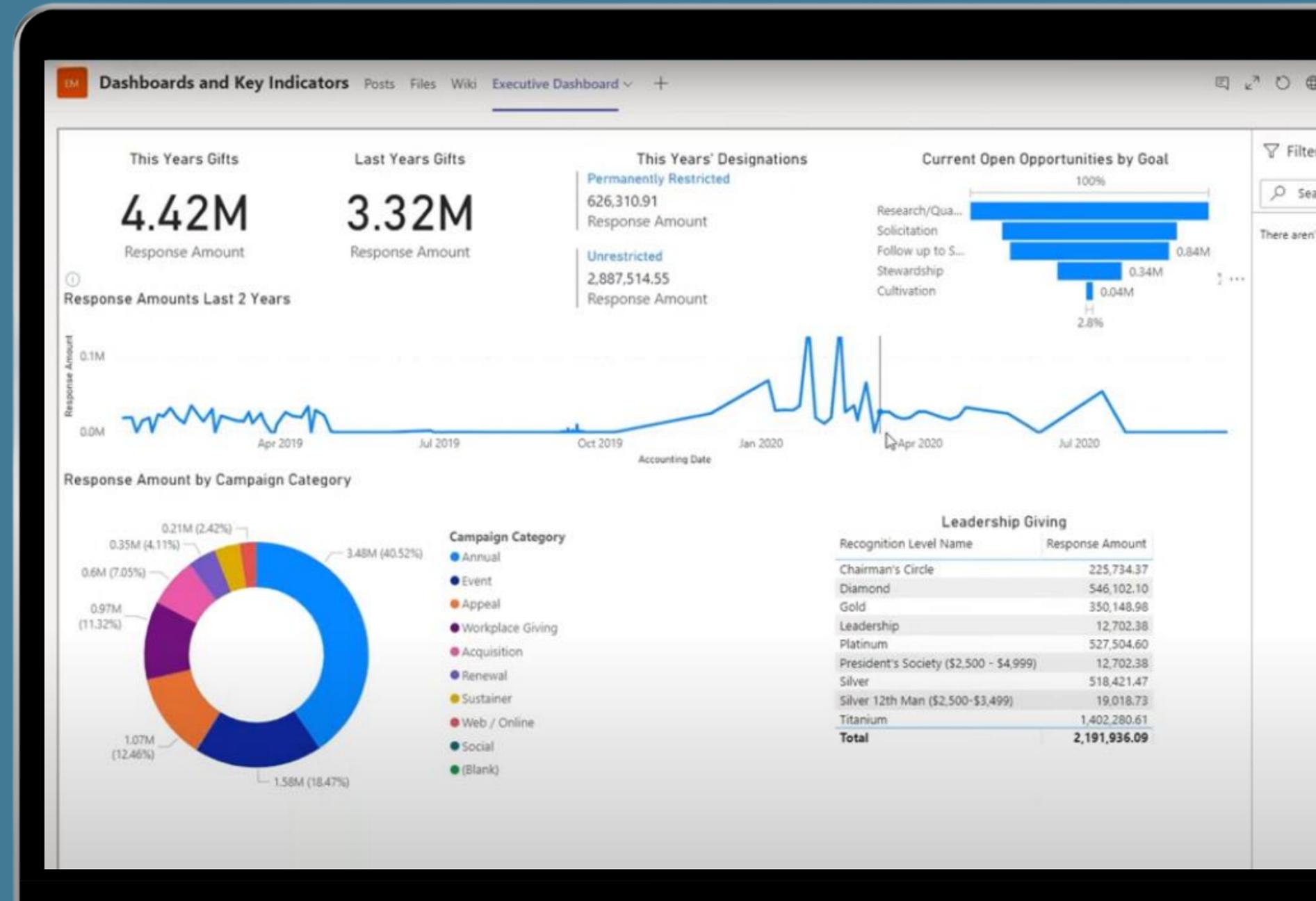
Type **Outright**

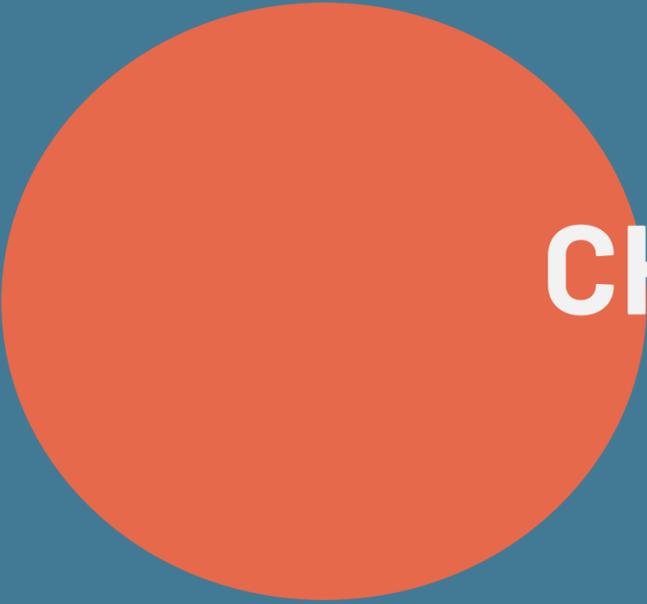
Description ---

TRACKING DIVERSIFIED REVENUE STREAMS



- Commit to the discipline of tracking goals for:
 - Financial Results
 - Non-Financial Results
 - # of constituents engaged
 - # of responses





CHOOSE YOUR PATH

You are launching a new program and need \$250k in new revenue over the next 3 months. Which two strategies do you pursue first and why?

Individual Giving

Recurring Giving

DIY/Team Fundraising

Corporate Partnerships



THANK YOU

FOR YOUR TIME!

WHEN THE BOARD SAYS: "WE NEED TO DIVERSIFY OUR REVENUE STREAMS."

YOU: PLANNING A GALA, APPLYING FOR 3 GRANTS, LAUNCHING A DONOR CAMPAIGN, AND SELLING COOKIES... ALL BY NEXT MONTH

