

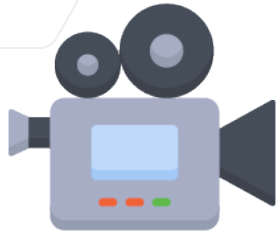
Donor Relations for Donor Retention

Thursday, January 25 | 12:00–1:00 p.m. ET

With Lynne Wester, Founder & Principal of the Donor Relations Group



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions



+ **We're recording this webinar!** We'll send you a copy after the webinar is complete.



+ **Feel free to ask questions!** Use the Q&A option to ask questions and the chat option for general discussion: we'll answer all questions in a Q&A portion at the end of the presentation.



+ **Share your highlights and takeaways** on your favorite social media channel and make sure to give us a follow!



FUNDRAISING TECH

Made for you



Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



Powerful integrations

Easily integrate with your third-party CRM, email provider, and accounting software



Donor Relations for Donor Retention

Lynne Wester, DRG

RETURNING DONORS

in Year #2

--- **DIVIDED BY** ---

ALL DONORS

in Year #1

Pop Quiz...

AVERAGE

46%



FIRST-TIME

23%



REPEAT

60%



MONTHLY

90%



So what?

Donor Attrition Over Five Years						
# of Donors	Attrition Rate	Donors Remaining After 1 Year	Donors Remaining After 2 Years	Donors Remaining After 3 Years	Donors Remaining After 4 Years	Donors Remaining After 5 Years
1,000	20%	800	640	512	410	328
1,000	40%	600	360	216	130	78
1,000	60%	400	160	64	26	10

FEP Project

- Thanking
- Stewardship
- Good data
 - Salutations
 - Channel preference
 - Areas of interest
 - Screening data
 - Engagement data
- Solicitation strategy
 - Number of asks
 - Ask strings
 - Targeted areas
 - Targeted channels
- Communications strategy
 - Touch frequency
 - Channel
 - Thanks or no thanks
 - Donor stories vs. beneficiary stories

Do you fundraise for **more donors or **more money**?**
Participation vs. dollars.

How Do We Affect Retention

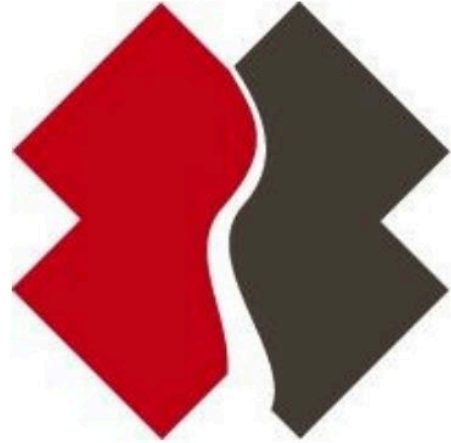
How many years does it take a donor to go from their **first gift to their first major gift?**

What happens in between?

Average Time to Major Gift

CASE STUDY

Thank you for your donation!



Thank You for Your Donation!

You have helped us continue our mission in a meaningful way.

Team Rubicon

Text Message
Today 11:54 AM



Team Rubicon's water rescue teams are in Houston conducting search and rescue. YOU made this possible. THANK YOU!

Thu, Aug 31, 12:28 PM

Team Rubicon lifesaving operations continue in Houston. Three of our floodwater rescue boat crews completed 42 rescues of survivors yesterday. You made that possible. Thank you.



Situation Report: Dozens of Residents Rescued | Team Rubicon

www2.teamrubiconusa.org

Hi Lynne,

My name's David Burke. Like many on our team, I started as a volunteer, quickly realized the tremendous impact Team Rubicon was having and joined full-time as Director of Field Operations. Back in July of 2015, we were responding to the devastating floods in Texas. More than 100 Team Rubicon members from across the country deployed to help those in need. One of those was Lissie Hagerman, an Air Force veteran.

Lissie came to help Texans in need, but ended up finding something much greater.



Through Team Rubicon, tens of thousands of veterans like Lissie have found that community in service. And with donors like you and the [Support Squad](#), we'll be able to continue to engage veterans and first responders in building community.


Thanks for helping us on our mission,

David Burke
Director of Field Operations

Disasters are our business.
Veterans are our passion.

Let us know how you want us to report impact. Examples of the kinds of communications we plan to send include: Situational Reports, photos and videos from the field, key stats, an After Action Report, our budget and breakdown of cost.

1. How frequently would you like a situational report?

Weekly 

2. Which are your preferred channels?

- Text (don't worry, we won't send at strange hours)
- Email
- I'm old school, send me a printed report

3. What content is most meaningful to you?

- Photos
- Videos
- Homeowner and veteran testimonials
- Breakdown of our budget: revenue and cost
- After Action Report

Dear Lynne,

I'd like to invite you to attend a video conference tomorrow, September 15 at 1:00pm ET in an effort to maintain transparency and clarity around our operations. During the meeting, I'll speak to our current response efforts, our recently launched [Open Initiative](#) and field any questions you may have.

Follow this link to register: www.primetime.bluejeans.com/a2m/register/rbtadsrc

Our teams have been working around the clock to provide relief to those affected by Hurricane Harvey, and we have recently launched recon teams to assess how Team Rubicon can assist those impacted by Irma.

I look forward to discussing with you tomorrow.

Gratefully,

Jake

Jake Wood

Co-founder and Chief Executive Officer

[Team Rubicon](#)

Hi Lynne,

I joined Team Rubicon in 2014 because I was lacking direction in my life. After leaving the Marines, I couldn't find that same purpose or drive in civilian life.

But after my first service project with Team Rubicon, I knew I had found exactly what I was looking for.

My journey within Team Rubicon has taken me from a volunteer to regional manager to Clay Hunt Fellow to a full-time staff position as the Region II Administrator. I've deployed to help those affected by earthquakes in Nepal and Hurricane Sandy in New Jersey.

I'm not great at talking about myself, so I figure this video is a better way to share my story with you.



My experience with Team Rubicon is not unique; there are tens of thousands of veterans and first responders who find the same sense of purpose, community, and identity that I have found in joining this new mission.

I hope you'll join the [Support Squad](#) to help engage more folks like me in Team Rubicon. \$11 a month isn't always easy, but you are making a tremendous impact on our veterans and the lives of those affected by disasters.

Jon Connors
Region II Administrator

Hi Lynne,

Thank you for being a committed member of the Support Squad and for allowing our volunteers to respond to disasters without delay! Team Rubicon would love to show our appreciation by sending you an exclusive Support Squad t-shirt.



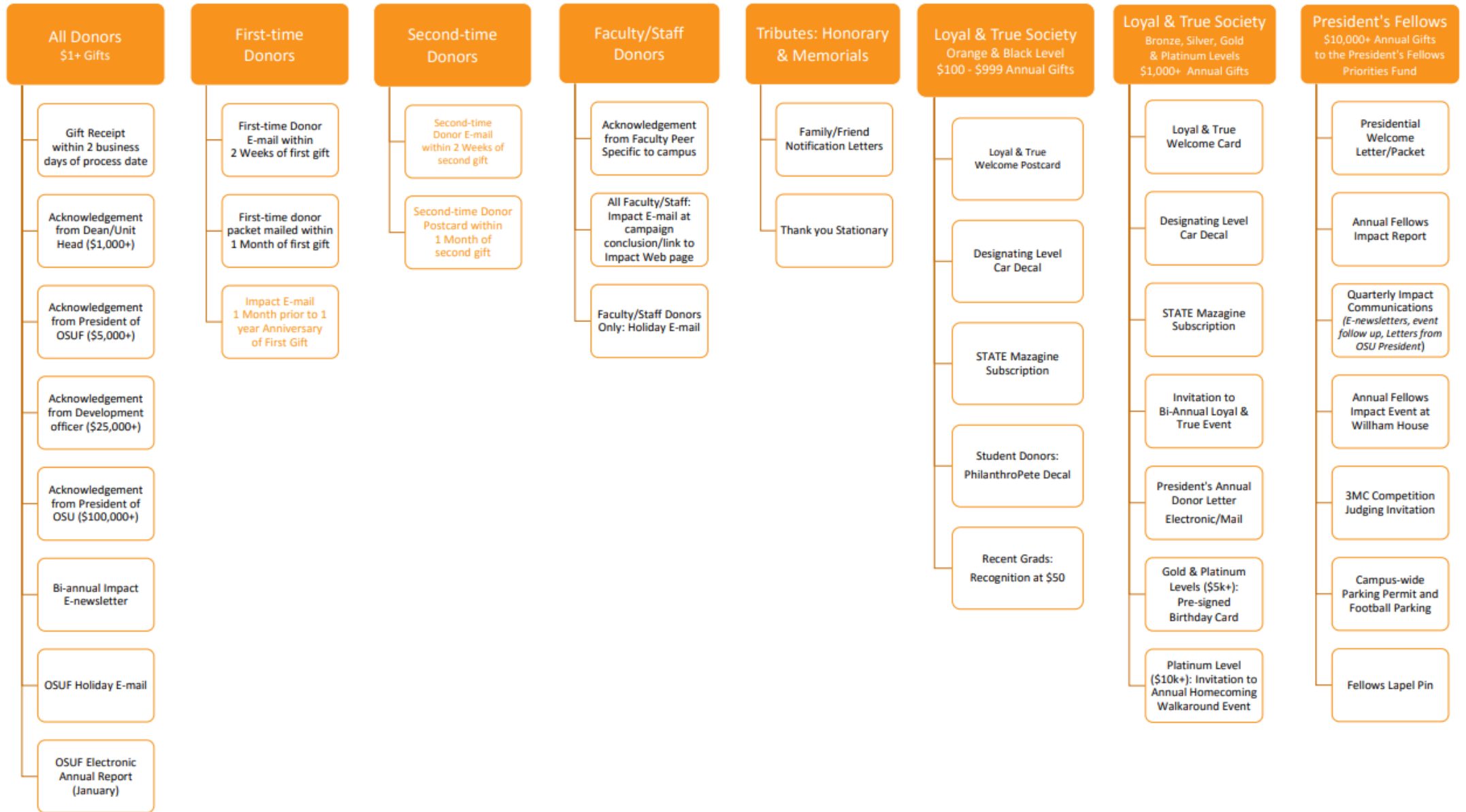
All we need from you is to fill out [this form](#) for sizing. Once we have this information, you can expect your Support Squad t-shirt in the mail within 2 weeks!

Best,

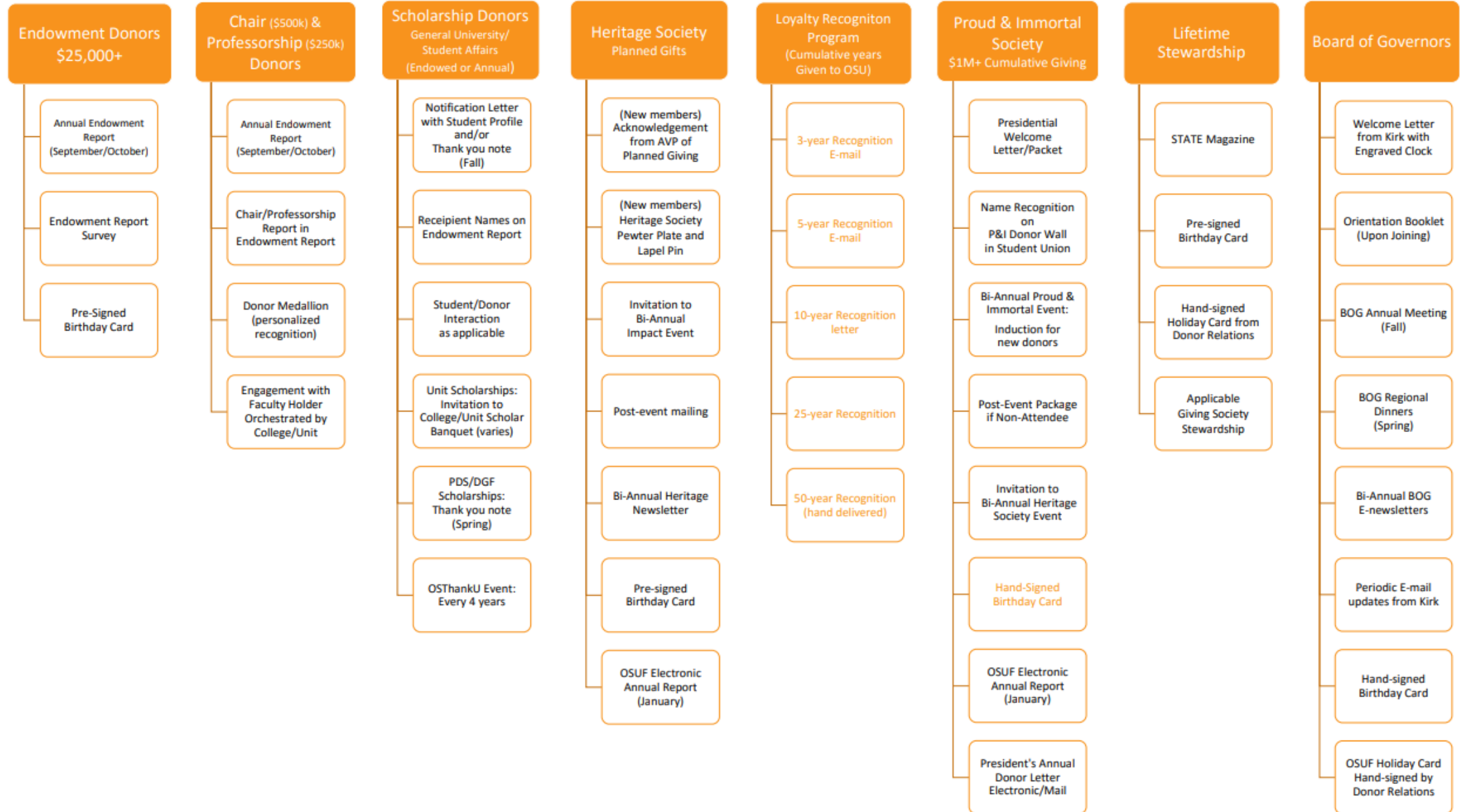
- **First time donors**
- All donors (\$1+)
- Giving day donors
- Honor and memory gifts
- Pledge payments
- Reacquired (lapsed) donors
- Increase / double donors
- **Monthly donors**
- Project / crowdfunding donors
- **Loyal donors (giving milestones)**
- Faculty and staff donors (one-time & payroll deduction)
- Named fund donors
- Planned giving donors
- Matching gift donors
- Event attendees

Identifiable Behaviors

Central Donor Relations: Donor Experience Matrix



Central Donor Relations: Donor Experience Matrix



ACTIVITY

Identify **one donor journey** (entry point) and list every touch point that donor may receive in one year.

KEY BEHAVIORS

First-Time Donors

- High priority for all DR shops
- FTD feed **all** fundraising pipelines
- Acquisition costs vs. retention costs **(7x)**
- Multi-touch, multi-channel approach
- **12-month** honeymoon period
- Ideally **1 touch per quarter**; minimum 1 acknowledgment and 1 impact-only touch
- No tchotchkes

First-Time Donors



Her first chance to be a part of a team



His first safe place to go when school is out



Her first time jumping in the pool without a lifejacket



Her first college visit as she prepares to graduate high school



His first reading buddy and role model



Her first step to a healthier lifestyle



YMCA OF GREATER CHARLOTTE
500 East Morehead Street, Suite 300
Charlotte, NC 28202

Throughout our lives we experience many firsts that shape who we are and will become. Your first gift to the YMCA of Greater Charlotte is no different. Your generosity is shaping the lives of kids, families and adults in need across our community.

Together, with your generous support, we are ...

- driving academic achievement and inspiring kids to reach their greatest potential;
- tackling our community's greatest health challenges and improving quality of life;
- and ensuring access and inclusion so that everyone has a chance to succeed and belong.

Thank you for your first gift to the Y. We're proud to welcome you to our family of donors, and we look forward to strengthening community together for many years to come.

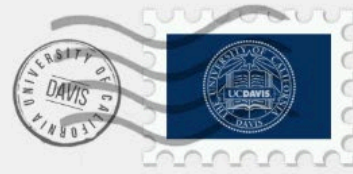
Visit ymcacharlotte.org/somuchmore to see more real stories of how your gift is making a difference.

The Y. So Much More™

Hi Lynne, UC Davis Made This Video Just For You

WATCH YOUR VIDEO!

UC DAVIS
UNIVERSITY OF CALIFORNIA



Lynne

ThankView

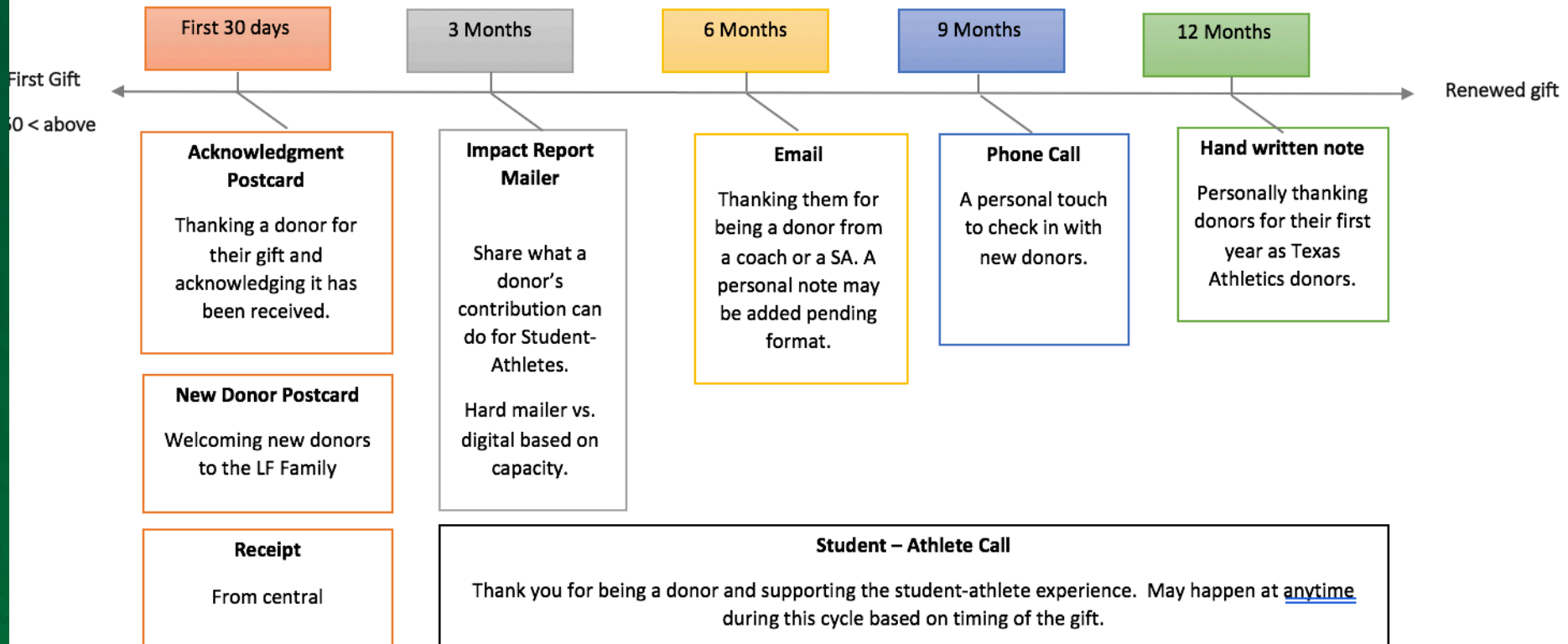
- <30 Days – Postcard or Email
- <3 Months- Hand-written note
- <6 Months- ThankView Video
- <11 Months Impact Report
- THEN and Only Then...



First Time Donor Journey

- **Acknowledgment Postcard**
- **New Donor Postcard** – ‘Welcome to the Family’
- **Receipt** – Confirmation of gift managed by central
- **Impact Report**– Distribution managed internally, hard mailer vs. digital based on capacity
- **Email** – Welcome video from a coach or SA, personalized note
- **Phone call** – Based on capacity, may be from a gift officer
- **Handwritten note** – Based on capacity
- **Student – Athlete Call** – Thank you for joining the Foundation

NEW DONOR STEWARDSHIP TIMELINE





FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

CELEBRATING YOUR GENEROSITY



Next month marks one year since your first charitable gift to the YMCA of Greater Charlotte!

Can you believe it's been almost a year since you joined our family of Y donors? Neither can we – time flies when your generosity is making a difference! Thank you so much.



Over the past year, because of donors like you, we've been inspiring young potential, improving quality of life for people facing significant health challenges and providing everyone with a place to belong at the Y.

Yet there is so much more to do. We have an extraordinary opportunity to serve even more people in need across our community; but only your continued support will make it possible.



Please consider renewing your gift to the YMCA Annual Campaign by giving online today at ymcacharlotte.org/donate.

**Every gift matters, especially yours.
Together, we can achieve so much more.**

The Y. So Much More™

YMCA Mission: To put Christian principles into practice through programs that build healthy spirit, mind and body for all.

YMCA OF GREATER CHARLOTTE

500 East Morehead Street, Suite 300
Charlotte, NC 28202



OH MY!
LOOK HOW
YOU GREW!



KEY TAKEAWAYS

- **Donor behavior**, not giving amount
- Flexible, timely, nimble
- Tell them **why** – affinity building language
- Create **unique engagement tracks** – one size does not fit all
- Multi-touch, multi-channel communications
- **Impact communications** are critical



Thank You!



DONORRELATIONSGURU.COM

Questions?

Please make sure your questions are typed in the Q&A box!

