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







+ 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



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	

- 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



11:55 AM

1 0 ₹ 78% **■**



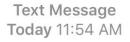








878-72



878-72



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











Text Message









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 <u>Support Squad</u>, we'll be able to continue to engage veterans and first responders in building community.

Thanks for helping us on our mission,

David BurkeDirector of Field Operations

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,

<u>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.</u>

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 <u>Support Squad</u> 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 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 (onetime & payroll deduction)
- Named fund donors
- Planned giving donors
- Matching gift donors
- Event attendees

Identifiable Behaviors

Central Donor Relations: Donor Experience Matrix

All Donors Second-time Acknowledgement First-time Donor Gift Receipt E-mail within from Faculty Peer within 2 business within 2 Weeks of Specific to campus 2 Weeks of first gift days of process date second gift All Faculty/Staff: Second-time Donor Acknowledgement First-time donor Impact E-mail at Postcard within from Dean/Unit packet mailed within campaign 1 Month of Head (\$1,000+) 1 Month of first gift conclusion/link to second gift Impact Web page Impact E-mail Acknowledgement 1 Month prior to 1 Faculty/Staff Donors from President of Only: Holiday E-mail year Anniversary OSUF (\$5,000+) of First Gift Acknowledgement from Development officer (\$25,000+) Acknowledgement from President of OSU (\$100,000+) Bi-annual Impact E-newsletter OSUF Holiday E-mail

OSUF Electronic Annual Report (January) Tributes: Honorary Loyal & True Society & Memorials Family/Friend Notification Letters Loyal & True Welcome Postcard Thank you Stationary Designating Level Car Decal STATE Mazagine Subscription Student Donors: PhilanthroPete Decal Recent Grads: Recognition at \$50

Loyal & True Society Presidential Loyal & True Welcome Welcome Card Letter/Packet Designating Level **Annual Fellows** Car Decal Impact Report Quarterly Impact Communications STATE Mazagine (E-newsletters, event Subscription follow up, Letters from OSU President) Invitation to Annual Fellows Bi-Annual Loyal & Impact Event at True Event Willham House President's Annual 3MC Competition Donor Letter Judging Invitation Electronic/Mail Gold & Platinum Campus-wide Levels (\$5k+): Parking Permit and Pre-signed Football Parking Birthday Card Platinum Level

Fellows Lapel Pin

(\$10k+): Invitation to

Annual Homecoming Walkaround Event

Central Donor Relations: Donor Experience Matrix

Scholarship Donors Proud & Immortal **Endowment Donors** Board of Governors \$25,000+ Notification Letter (New members) with Student Profile Annual Endowment Annual Endowment Presidential Welcome Letter Acknowledgement and/or Welcome from Kirk with Report Report STATE Magazine 3-year Recognition from AVP of Thank you note Letter/Packet (September/October) (September/October) Engraved Clock Planned Giving E-mail (Fall) (New members) Name Recognition Chair/Professorship Receipient Names on Heritage Society Endowment Report Orientation Booklet 5-year Recognition Pre-signed Report in Endowment Report P&I Donor Wall Pewter Plate and (Upon Joining) Survey E-mail Birthday Card Endowment Report in Student Union Lapel Pin Bi-Annual Proud & Student/Donor Donor Medallion Invitation to Hand-signed Immortal Event: Pre-Signed **BOG Annual Meeting** 10-year Recognition (personalized Interaction Bi-Annual Holiday Card from Birthday Card (Fall) letter Induction for as applicable Impact Event recognition) Donor Relations new donors Unit Scholarships: Engagement with **BOG Regional** Applicable Faculty Holder Invitation to Post-Event Package Post-event mailing Giving Society Dinners 25-year Recognition College/Unit Scholar if Non-Attendee Orchestrated by (Spring) Stewardship College/Unit Banquet (varies) PDS/DGF Invitation to Bi-Annual Heritage Scholarships: Bi-Annual BOG 50-year Recognition Bi-Annual Heritage Thank you note Newsletter E-newsletters (hand delivered) Society Event (Spring) Hand-Signed Periodic E-mail OSThankU Event: Pre-signed Birthday Card Every 4 years Birthday Card updates from Kirk OSUF Electronic OSUF Electronic Hand-signed Annual Report Annual Report Birthday Card (January) (January) President's Annual OSUF Holiday Card Hand-signed by Donor Letter Electronic/Mail **Donor Relations**

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





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.

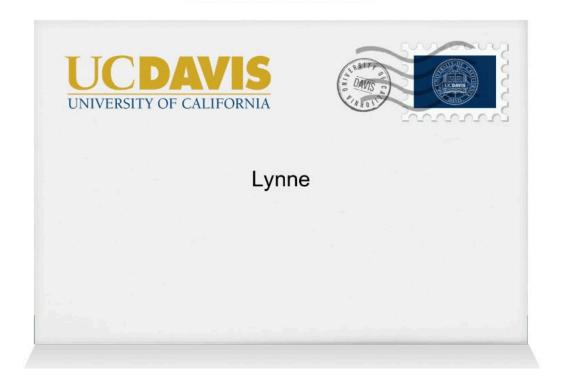
Thank you for your first gift to the Y. We're proud to welcome you to our family of donors, and we look forward to strengthening community together for many years to come.

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

The Y. So Much More™

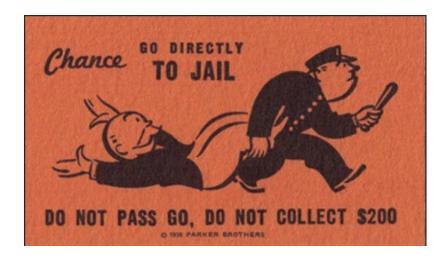
Hi Lynne, UC Davis Made This Video Just For You

WATCH YOUR VIDEO!



ThankView

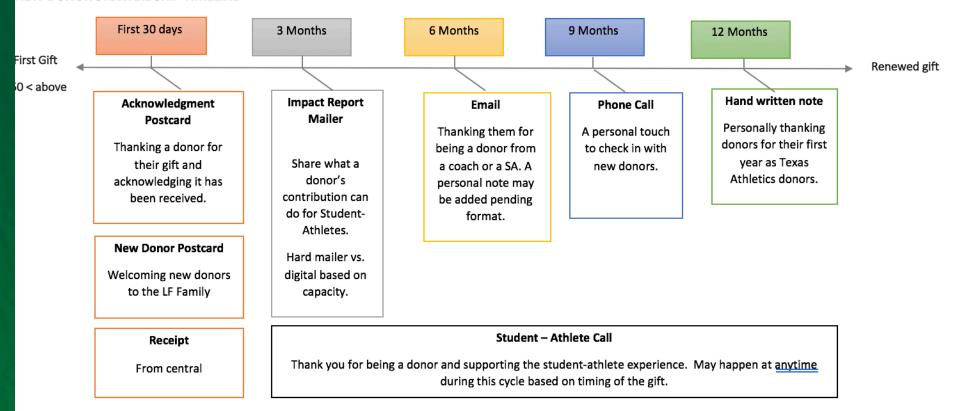
- <30 Days Postcard or Email
- <3 Months- Hand-written note
- <6 Months-ThankView Video
- <11 Months Impact Report</p>
- THEN and Only Then...



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





CELEBRATING 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







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!





Questions?

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

