



CommunityFunded™

Thank & Retain Your Platform's Donors



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— WHY IS THIS IMPORTANT?

At the heart of every donation is the desire to make a difference and see change. It's no surprise, then, that the single most important element of donor retention is making every person feel as though they've made a valuable impact.

That's why every fundraising campaign on your platform should end in a resolution — one that emphasizes gratitude for the help received to get there and that showcases what was achieved. Ultimately, this is what will drive participation and retention, help spread your message, and influence others' willingness to enlist the help of those around them.

Remember: campaigns are ongoing stories that need to emphasize impact throughout. And while you're the one telling the story, you should always cast your donor as the hero!



1

PUT DONORS FIRST



You need to define exemplary stewardship before you fundraise. This can seem backwards, but it's a great way to envision the giving process holistically and create more impactful stories.

Start by establishing overall standards for how you want to nurture your platform donors. You should consider:

1. How quickly a donor should be thanked after a campaign gift.

Pro Tip: Ideally a donor should be thanked right after they make a gift. However, if time doesn't allow make sure to thank everyone the day a campaign ends. Even if the update is a simple thank you with a reminder to stay tuned, this helps keep the donor invested.

2. How many updates they should receive at a minimum and over what time period.

Pro Tip: Try to give at least 3 post-campaign updates. We recommend the day the campaign ends, a week after, and 1-2 months after when the impact has been reached. To create an even more meaningful experience, you can send donors an update six months or a year after the campaign ends as a check-in.

3. How long you should wait before another ask is made.

Pro Tip: A [survey of nearly 3,000 donors](#) found that 63 percent of respondents preferred a nonprofit to wait at least seven months before asking for a second gift.



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Next, take a look at your current donor communications. How many times a year do you solicit, inform, invite, and thank donors that might overlap with your ideal platform stewardship?

Try to survey all departments within your advancement shop to get a complete picture of your donor communications. If you identify any efforts that could derail the progression of your platform's giving narrative, work with your Advancement Services department to set up a system for properly coding donors. This will help you enroll them in the right communications at the right time.



2

LISTEN AND LEARN



Once you have your communication standards established, you need to consider the different types of donor interactions and how they should guide your stewardship efforts.

Keep in mind that an interaction isn't just donating money: it can be someone sharing your efforts with their network, volunteering their time, or even gifting resources — like a business donating rewards. Each of these actions deserves recognition, so make sure that campaign creators and your advancement office are actively keeping track of who's doing what.

One of the most important elements to track in your database is the channel a donor uses to interact, as this is a signal of their communication preference. You shouldn't thank someone who donated online through a direct mail campaign; they've shown they prefer to receive information digitally. Send them an email, thank them on your website, and/or profile them in an online newsletter.

In the same vein, if someone shares your fundraising campaign on social media, don't just send them an email two days later! Give them a shout out right then and there.

Make sure your donor relations plan involves stewardship tactics that cover a variety of channels so you can meet donors where they live. We'll supply you with some ideas you can incorporate into your stewardship at the end of this pocket guide.



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Another element you should be actively tracking is the cause a donor chooses to support. The beauty of campaign-based fundraising is that donors are self-selecting their passions and actively telling you about them. To show you're listening, you need to keep your long-term outreach focused on the information they provide. Make sure you're recording not only the name of the campaign they give to, but the type. Types of campaigns can vary from topics as broad as 'athletics' to something as specific as 'cancer research.'

You should try to align the types of campaigns you develop outreach for with the likelihood you'll see them re-occur on your platform. If you do this thoughtfully, you'll be able to tailor your communication efforts to specific donor segments as you look to drive further engagement. After all, if you bought cake mix on Amazon and they suddenly started showing you ads for treadmills you'd be confused (and maybe mildly offended).

No one likes getting solicitations that aren't tied to what they're interested in.



3

THANK THEM GENUINELY



There are three golden rules for any thank you message:

1. Use “you” language. We know your organization and cause are awesome (seriously, we think you’re great), but this about how amazing your donor is.

2. Don’t “thask” your donors. Don’t include a solicitation in your follow-up. The #1 reason people stop giving is because they’re over-solicited and under-appreciated. Keep your messaging focused on donor impact.

3. Donors want to hear from recipients. Your message should focus on humanizing a donor’s gift by emphasizing the transformative effect it had on real individuals. Even if a donor gives to an unrestricted fund, you should tell them where their gift will go and what it will do.

Your messages should meet all three of the criteria, be visually engaging, and, above all, focus on inspiring your donors. While you can talk about data points like how many people your cause affected, try to focus instead on the stories of specific individuals. This will help emotionally engage your donors, and can go a long way in fostering long-term retention.



 **DONOR IMPACT**

 **PERSONAL**

THANK YOU LYNNE!

YOU'VE JUST CHANGED LIVES.

This is Helen Apio. She used to walk a mile and a half to a neighboring village to get water. The walk was long, and the wait was even longer once she got there. Helen's village didn't have a well.

When she brought the water home, she'd say to herself, "How should I use this water today? Should I water my garden so we can grow food? Should I wash my kids' uniforms? Should I use it to cook? Should we drink this water?" With two children, one husband and 10 gallons, Helen never had enough water.

We saw the shame in her eyes when she described how her two kids were often sent home from school because their uniforms were dirty.

But a few years ago, people did exactly what you did today -- they donated. And because of those donations, Helen's village got a well. **Now, Helen has all the water she needs.**



 **CLEAR RESULT**

 **HERO SHOT**



4 KEEP THE STORY GOING



Philanthropy is ongoing, not a one-time transaction. That's why it's critical that campaigns continue to update donors on their progress well after they've ended. These can be posts or videos, but they should communicate the campaign's outcomes, progress, and even challenges as they move forward. Transparency and human impact should be the focus, not data or further asks.

It's also critical to have an intentional and transparent handoff from a campaign to your organization's Development office following the final update. The message from a campaign should look something like this:

"Thank you again for your donation to our work study abroad program! Your donation helped us build houses for more than 50 people in our rural village. Here are some pictures from our adventure! Also, please watch this 2 minute video of thanks from the campaign team."

"Our campaign is over, but stay tuned for more campaigns like ours presented by the men and women of Random & Company. With your help and the help of others, many of these amazing initiatives will have a huge impact around the globe."

This sort of message transparently informs the donor that they will be communicated with regarding other campaigns. Most importantly, this kind of message removes any element of surprise when the donor is contacted later. As a reminder, that first contact should still be a message of appreciation, and not an ask. This is especially essential to building trust with net new donors that have had no previous affinity to your organization.



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The final step in creating awesome donor relations is setting up a measurement system to help you continually improve. As a baseline, you should be measuring both overall and new donor retention year-over-year. That's the percentage of donors who gave one year and again the next. This will allow you to see how your efforts pay off and where you could improve as you move forward.

Donor Relations is not an expensive investment, but the returns are priceless.



5

IDEAS TO INSPIRE



If you're stumped on where to start for generating some killer ideas for donor retention, don't worry: we've got your back! Take look at our stewardship brainstorm below and pick your favorites or just get inspired.

- 1.** Schedule monthly times for making thank you calls. Get everyone in the department to commit to this "thank-a-thon" as a team!
- 2.** Make a special thank you video for one of your appeals.
- 3.** Develop a stewardship section on your website to engage online donors.
- 4.** Host an appreciation event.
- 5.** Create a new donor welcome package.
- 6.** Recognize in honor/in memory gifts in a special way. Maybe with a specially designed thank you card.
- 7.** Profile donors in your communications, like the newsletter.
- 8.** Create a stewardship report for one of your main program or service.
- 9.** Digitize your annual report to reach more of your supporters.
- 10.** Create a stewardship matrix to show what you'll do for donors who give at various levels. For instance, \$1 to \$99, \$100 to \$249, etc. That way all staff members will be on the same page for stewardship.



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- 11.** Thank donors via social media. Add a field to collect Twitter handles to your donation form.
- 12.** Revamp your online gift autoresponder. You know, that email people get to confirm their gift? Make it more awesome!
- 13.** Take out an ad in the local newspaper on National Philanthropy Day to thank your community.
- 14.** Revise your thank you letter template annually.
- 15.** Be thoughtful – make notes of personal details you hear in conversation with donors. Did Sally tell you her daughter is celebrating her 10th birthday this weekend? Ask how the party was the next time you talk to her. People will always appreciate the fact that they were heard.
- 16.** Genuinely make an effort to get to know your donors. The phone is your friend in this endeavor.
- 17.** Know your donors' wishes and respect them – use an annual survey to collect this information and record it on your donor records.
- 18.** Start your thank you letters with something other than, "On behalf of [x organization], thank you for your recent gift," or "Thank you for your recent gift." You're better than that, and so is your donor.
- 19.** Resolve any donor complaints and issues within 24 hours. Yes, this is not the most fun part of our job but it is at the core of being a good steward.
- 20.** Handwrite thank you notes.



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- 21.** Send an anniversary card to recognize donor loyalty and have it signed by the Chair of the Board or Executive Director. Make cards for 5, 10, 15 and 20 years of giving.
- 22.** Set up hashtags for your campaigns and platform to easily collect social interactions. Then like each post you collect and tag donors in a thank you message in real-time.
- 23.** Post a message on your website that promotes thankfulness to a broad audience.
- 24.** Create and send a welcome package to educate new donors on your organization. Include items like photographs, surveys, even a small gift.
- 25.** Ask for a donor's birthday on your thank you page. Then send them information during that month on how they can ask for donations from friends and family instead of gifts.



— WANT MORE?



Lynne Wester

Founder- Donor Relations Guru



Join Donor Relations Guru Lynne Wester as she discusses tactics and best practices for creating long-term donor relationships in today's higher education fundraising environment. Lynne uses examples from across the industry to paint a portrait of how your institution can create an "attitude of gratitude" and maximize donor retention.

You'll leave this interview with real-world examples of how to create a fundraising program that is donor-centric and sustainable.

Listen Now →

