PART 2: HARNESS YOUR YEAR-END GIVING SUCCESS TO STEWARD AND RETAIN YOUR DONORS

ACT for Alexandria
January 14, 2021 from 12:00 – 1:30pm
Session Ground Rules

MUTE YOURSELF
KEEP YOUR CAMERA ON
BE OPEN TO NEW IDEAS

BE AN ACTIVE BREAKOUT GROUP PARTICIPANT
POSE QUESTIONS IN THE CHAT BOX
USE THE ZOOM “REACTIONS”
INTRODUCTIONS

Chat Box Question: On a scale of 1 to 5 (5 being EXCELLENT), how would you rate your organization’s donor stewardship plan?
Donor Cycle

1. IDENTIFY
2. CULTIVATE
3. SOLICIT
4. ACKNOWLEDGE
5. ENGAGE
6. STEWARD

ACT for ALEXANDRIA
Stewardship Improves Retention

Did you know that donor retention is nationally this low?

- **AVERAGE**: 46%
- **FIRST-TIME**: 23%
- **REPEAT**: 60%
- **MONTHLY**: 90%
Our Plan for Today

- Analyzing YE Results
- Overview of Stewardship Elements
- Template Review
- Breakout Group
- Debrief, Questions
- Closing Thoughts, Questions
ANALYZING YEAR-END RESULTS
Analyze Your Results by Segment

- Special circumstances (e.g. Board, connectors)
- Major-level (e.g. $500+)
- Mid-level (e.g. $250 - $499)
- Annual fund (e.g. $1 - $249)
Performance Overview

High-level overview determined by:

Gross revenue \(-\) Direct expenses = Net revenue
## Solicitation Activity Performance

For each donor segment, analysis metrics include:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross revenue</td>
<td></td>
</tr>
<tr>
<td>Net revenue</td>
<td></td>
</tr>
<tr>
<td>Number of donors</td>
<td></td>
</tr>
<tr>
<td>Gifts secured</td>
<td></td>
</tr>
<tr>
<td>Response rate</td>
<td></td>
</tr>
<tr>
<td>Retained donors</td>
<td></td>
</tr>
<tr>
<td>Reactivated donors</td>
<td></td>
</tr>
<tr>
<td>Upgrade, downgrade, same</td>
<td></td>
</tr>
<tr>
<td>Average gift</td>
<td></td>
</tr>
<tr>
<td>Average major gift</td>
<td></td>
</tr>
<tr>
<td>Online gift percentage</td>
<td></td>
</tr>
<tr>
<td>Undeliverable, unsubscribe</td>
<td></td>
</tr>
</tbody>
</table>
Qualitative Analysis

- How was our timing?
- What messages resonated? Or didn't?
- Did our volunteers engage with us?
- Did we get "shares" and "likes"?
DEVELOPING YOUR YEAR-ROUND STEWARDSHIP PLAN
## Identify Stewardship Activities

<table>
<thead>
<tr>
<th><strong>Donor Segment</strong></th>
<th><strong>Activity Category</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual fund</td>
<td>Gift acknowledgement</td>
</tr>
<tr>
<td>Mid-level</td>
<td>Donor recognition</td>
</tr>
<tr>
<td>Major-level</td>
<td>Informative communications</td>
</tr>
<tr>
<td>Special circumstances (Board, connectors)</td>
<td>Cultivation (virtual, in person)</td>
</tr>
<tr>
<td></td>
<td>Solicitation</td>
</tr>
<tr>
<td>First-time</td>
<td></td>
</tr>
<tr>
<td>Recurring</td>
<td></td>
</tr>
<tr>
<td>Lapsed</td>
<td></td>
</tr>
<tr>
<td>Planned giving</td>
<td></td>
</tr>
</tbody>
</table>
Develop Your Timeline

• Monthly e-newsletter
• Quarterly social media donor testimonial and video
• Annual report in September
• Donor thank you event in March
• Spring2ACTion on April 28th

Existing “plug and play”

• Quarterly program update for major donors
• October thank-a-thon
• September/January virtual townhall with ED
• 3-part email/call series for first-time donors

New “what else?”
BREAKOUT GROUPS

Discuss each section of the template, fill out as you go.
Susan will pop into groups to answer questions and assist as needed!
DEBRIEF
Let’s Wrap Up

FINALIZE YOUR YEAR-ROUND STEWARDSHIP PLAN TEMPLATE

COMPLETE YOUR YEAR-END DONOR ACKNOWLEDGEMENT IN JANUARY

INCORPORATE SPRING2ACTION ON APRIL 28, 2021

SEND ANY LINGERING QUESTIONS TO SUSAN@KELLYSTRATEGIES.COM