

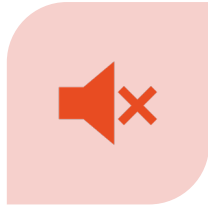


PART 2: HARNESS YOUR YEAR-END GIVING SUCCESS TO STEWARD AND RETAIN YOUR DONORS

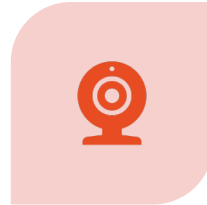
ACT for Alexandria

January 14, 2021 from 12:00 – 1:30pm

Session Ground Rules



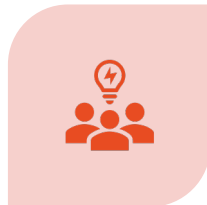
MUTE YOURSELF



KEEP YOUR CAMERA
ON



BE OPEN TO NEW
IDEAS



BE AN ACTIVE
BREAKOUT GROUP
PARTICIPANT



POSE QUESTIONS
IN THE CHAT BOX



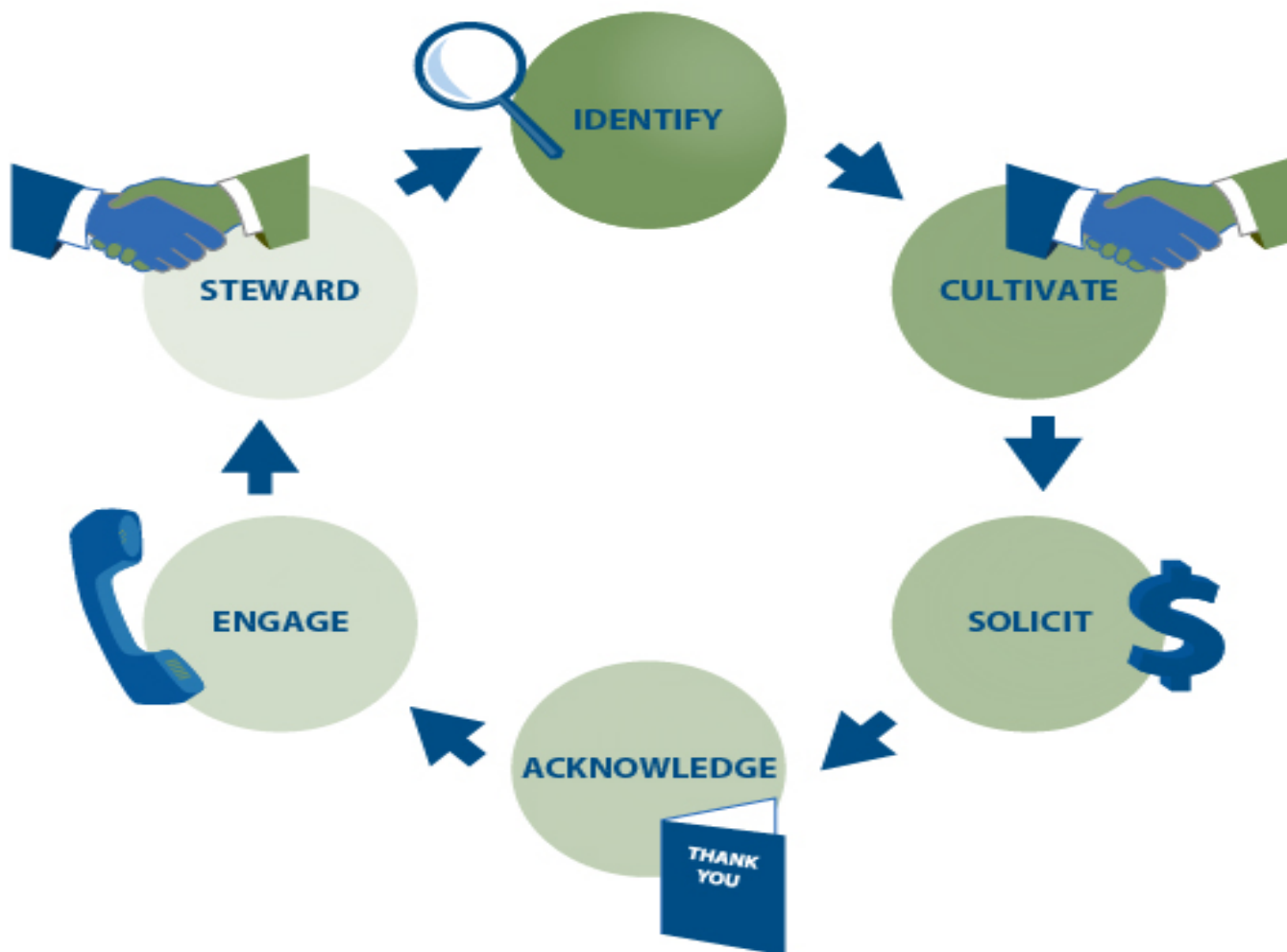
USE THE ZOOM
“REACTIONS”



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



Stewardship Improves Retention



Did you know that donor retention is nationally this low?

AVERAGE

46%



FIRST-TIME

23%



REPEAT

60%

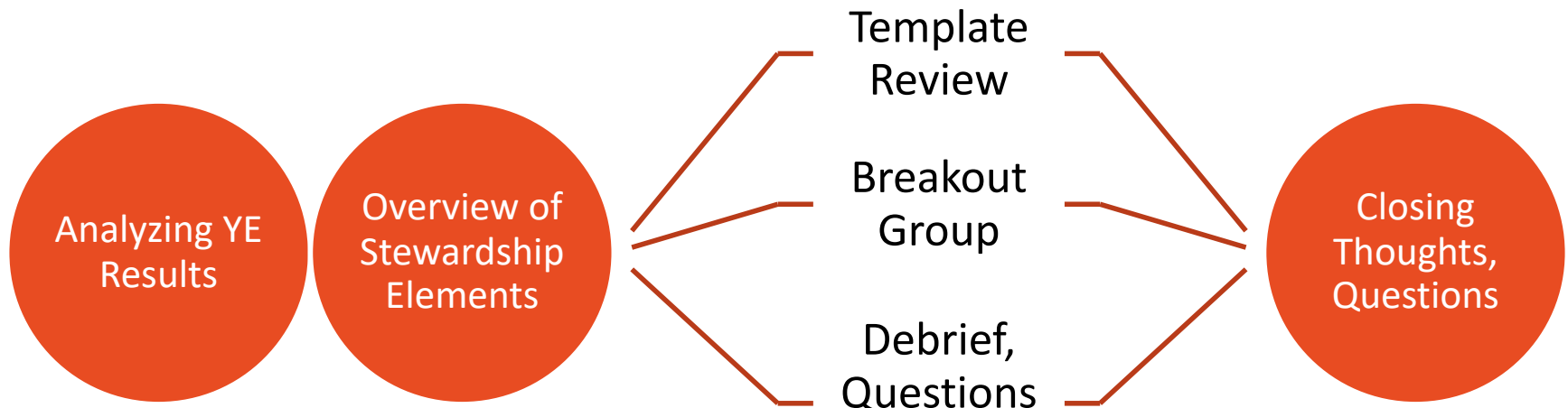


MONTHLY

90%



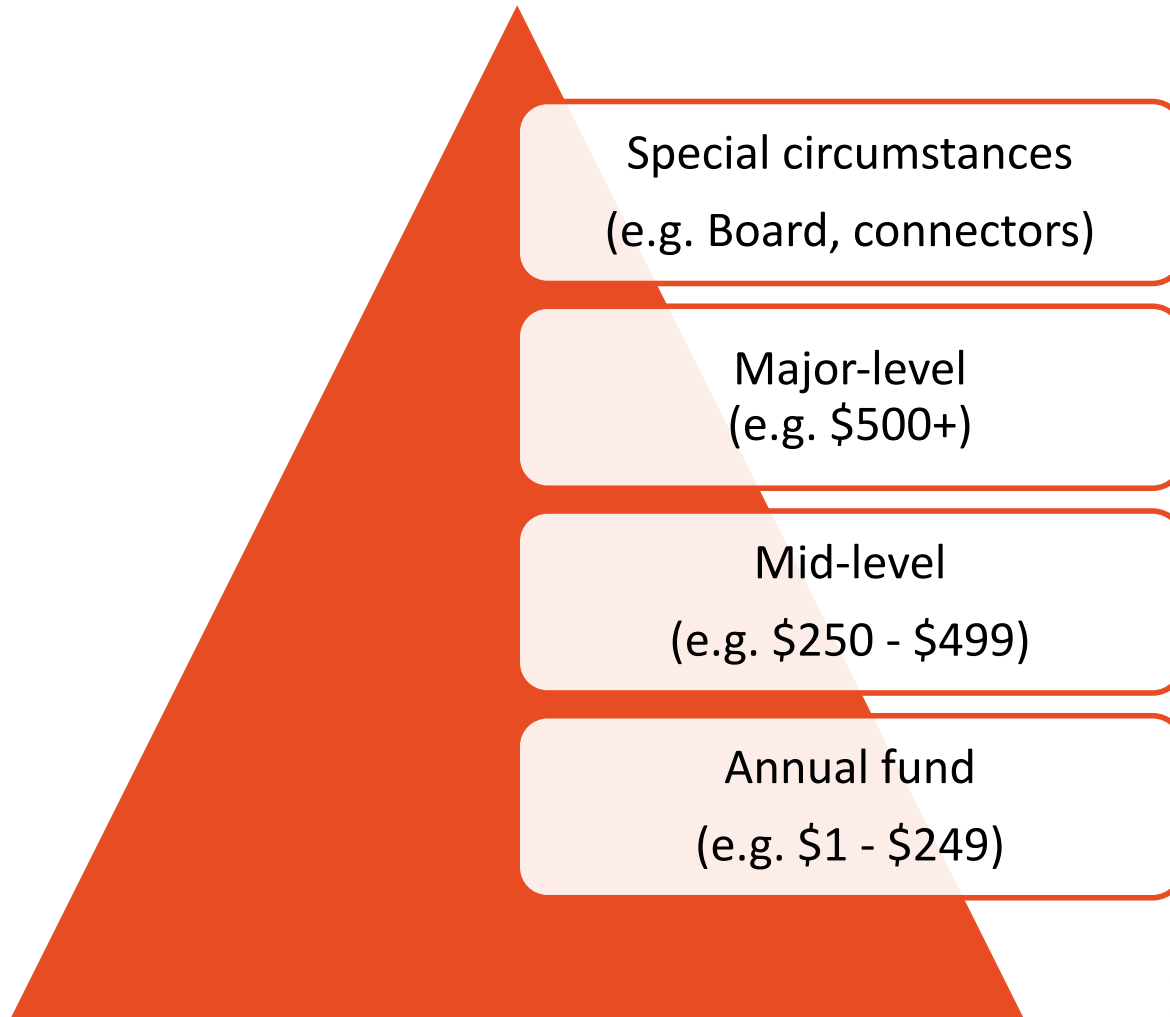
Our Plan for Today





ANALYZING YEAR-END RESULTS

Analyze Your Results by Segment



Performance Overview



High-level overview determined by:



Solicitation Activity Performance



For each donor segment, analysis metrics include:

Gross revenue

Net revenue

Number of
donors

Gifts secured

Response rate

Retained
donors

Reactivated
donors

Upgrade,
downgrade,
same

Average gift

Average major
gift

Online gift
percentage

Undeliverable,
unsubscribe

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



Donor Segment

- Annual fund
- Mid-level
- Major-level
- Special circumstances (Board, connectors)

and...

- First-time
- Recurring
- Lapsed
- Planned giving

Activity Category

- Gift acknowledgement
- Donor recognition
- Informative communications
- Cultivation (virtual, in person)
- Solicitation

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”

New
“what else?”

- 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



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