# Strategic Stewardship to Increase Donor Retention

## A Presentation for Participating Big Give Non-Profit Organizations

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Consultant & Strategist
DRG Group

- Identifying priority donor populations for targeted stewardship

- Demonstrating impact to improve retention

- Putting the principles into practice: A "Giving Day" case study

# AGENDA

# Pop Quiz!

Credit: Bloomerang

# National Averages

# Donor Participation

# ≠ Retention

| 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 |

# By the Numbers

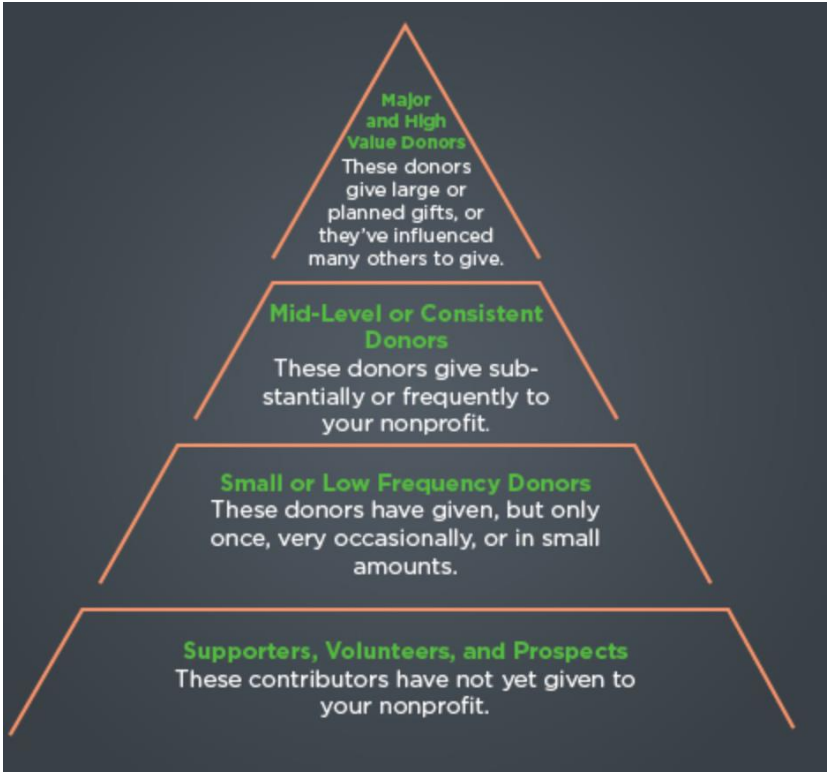
# Why Do Donors Leave?

- Legitimate reasons (out of our control)
- Too many solicitations
- Not enough (or any) genuine gratitude
- Lack of impact reporting
- Poor communication (quantity, quality, delivery mechanism, incorrect data)
- Lack of personal connection

# Why Do Donors Stay?

- Prompt and meaningful thank you – genuine appreciation
- Meaningful impact reporting
- Donor feels part of meaningful cause
- Positive relationship or interactions with faculty/staff/leadership members
- Given opportunities to see gift at work

# Recognition & Acknowledgement




# Traditional Construct

CommunityFunded™
Inspiring Philanthropy

# Inclusive Engagement Model

# PRIORITY BEHAVIORS

# FIRST TIME & LOYAL DONORS

- High priority for all organizations (TEST GIFTS!)
- 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

- <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

**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 ...

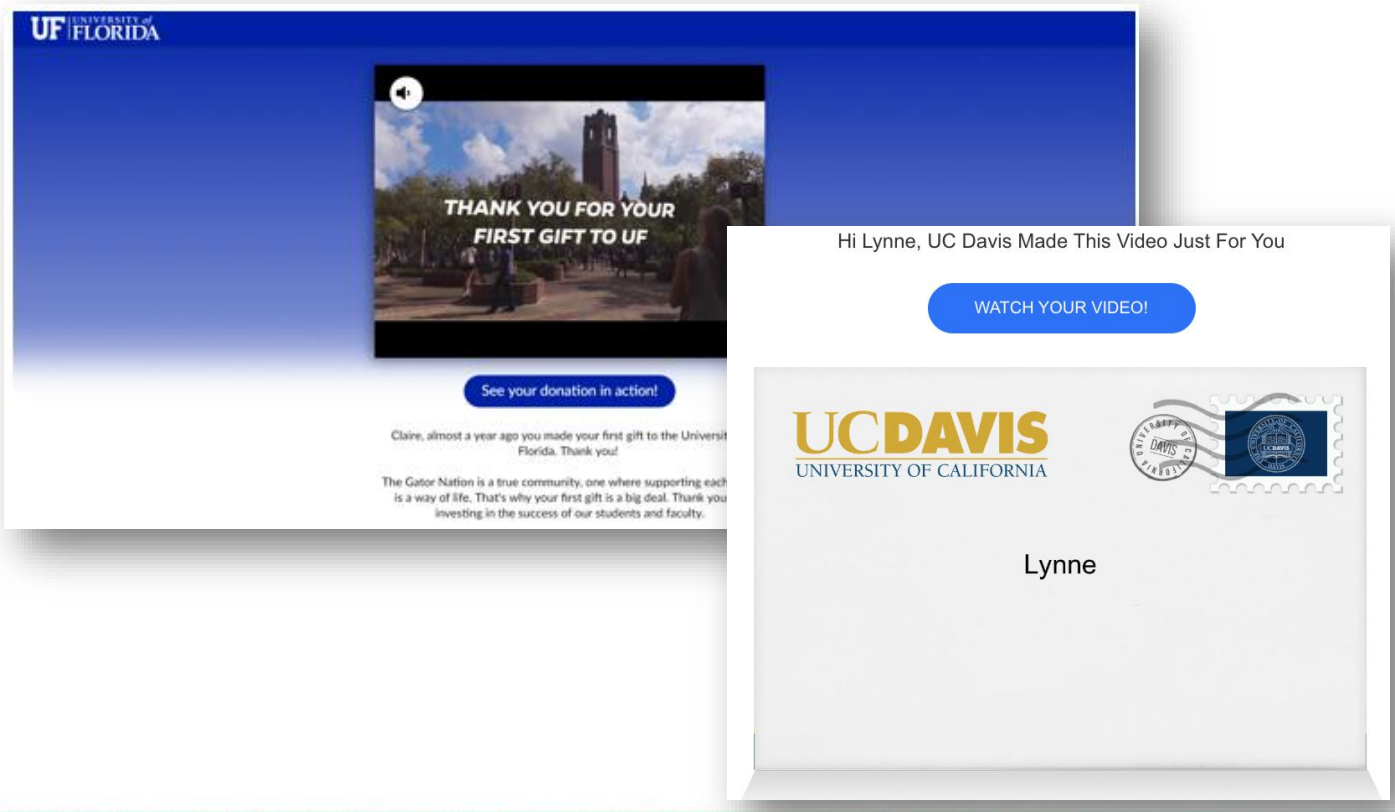
- driving academic achievement and inspiring kids to reach their greatest potential;
- tackling our community's greatest health challenges and improving quality of life;
- and ensuring access and inclusion so that everyc a chance to succeed and belong.

Thank you for your first gift to the Y. We're proud to welcome you to our family of donors, and we look fo strengthening community together for many years t

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

The Y. So Much More™

YMCA Mission: To put Christian principles into practice through programs that build healthy spirit,




# ThankView / Video

**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.

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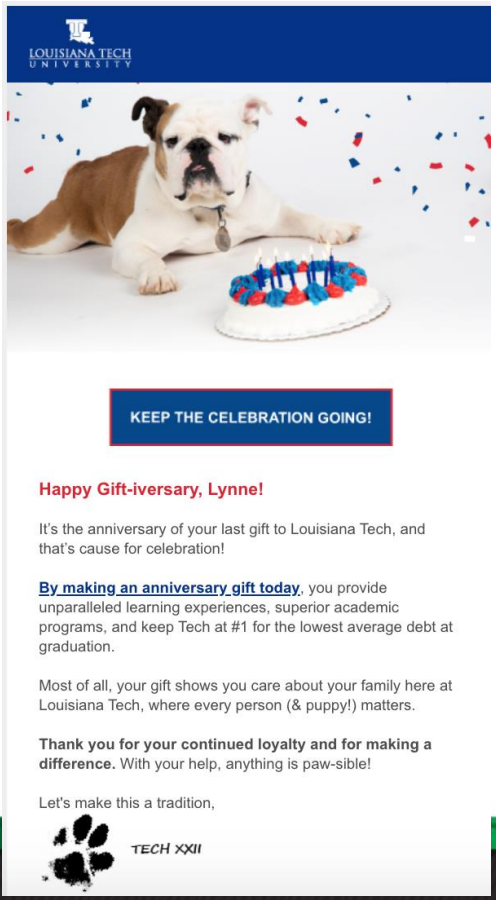
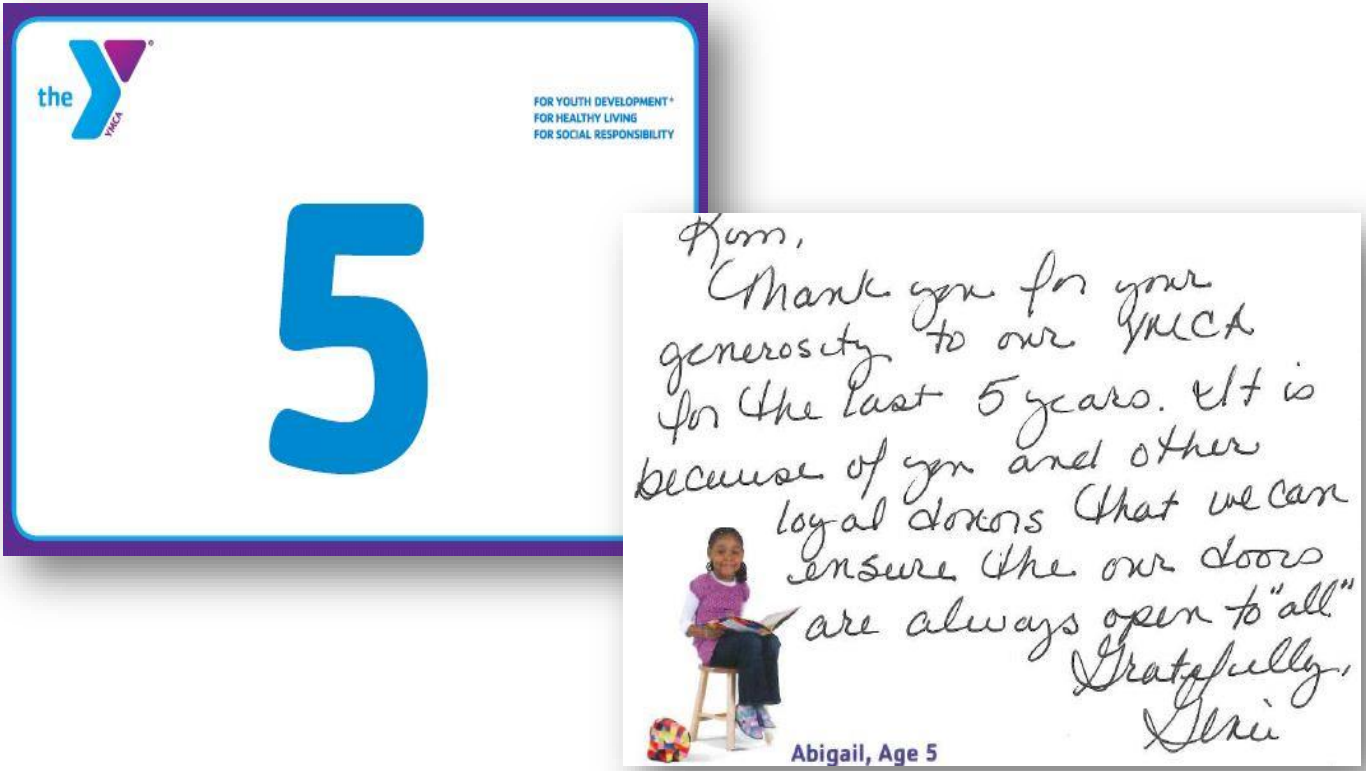
# Gift Anniversaries




# Gift Anniversary / Solicitation




# Loyal Giving Recognition

Date

Mrs. Five Year Donor
Address
City, State Zip

Dear Five,

This little swimmer was born the year you started giving to the Harris YMCA. For five years you have been a part of a community that believes everyone should learn to swim and be safe around the water. Your generosity to the YMCA Annual Campaign allows us to provide opportunities for all regardless of their ability to pay. Not only have you helped ensure that one more child will learn how to be safe around water you have helped develop confidence and create life long memories.

Thank you for believing in our YMCA and making a difference for 5 years.

Happy Anniversary,

Dean M. Jones
Senior Vice President and CDO

# Loyal Giving Recognition

# EMERGENCY/UNRESTRICTED FUND DONORS

- Impulse philanthropy – emotional and timely
- Expectation for immediate utilization
- Short attention span for your organization – utilize video, email, social media
- Communication/giving channels matter
- Don't drop into mainstream processes
- No tchotchkes (exception for QPQ solicitations)

# CONVERSION STRATEGIES

- Develop separate stewardship plans for emergency donor populations
- Continued segmentation for 1 full year
- Personalize acknowledgment communications to reflect specialized giving
- Send impact communication on gift utilization within 1-3 months
- Implement impact touch point at major milestone or key anniversaries
- Short, visually interesting, infographics, dynamic

## Aid-a-Gator Landing Page (Click for Video):

| Email Name | Successfully Sent | Opened | Clicked | Views | Shares | Downloads | Replies |
|---|---|---|---|---|---|---|---|
| Aid-a-Gator Stewardship | 427 | 330 (77.3%) | 226 (52.9%) | 342 | 12 | 8 | 11 |

TEAM RUBICON
DISASTER RESPONSE

Lynne,

Many of Team Rubicon's disaster relief operations are in response to storms only impacted communities ever see. On someone's worst day, network cameras may not be rolling and financial backing for the storm recovery might be lacking. That's when Team Rubicon's reserve funds go to work, courtesy of our generous **Support Squad members like you.**

FOLDS of HONOR

# WINGMAN Newsletter

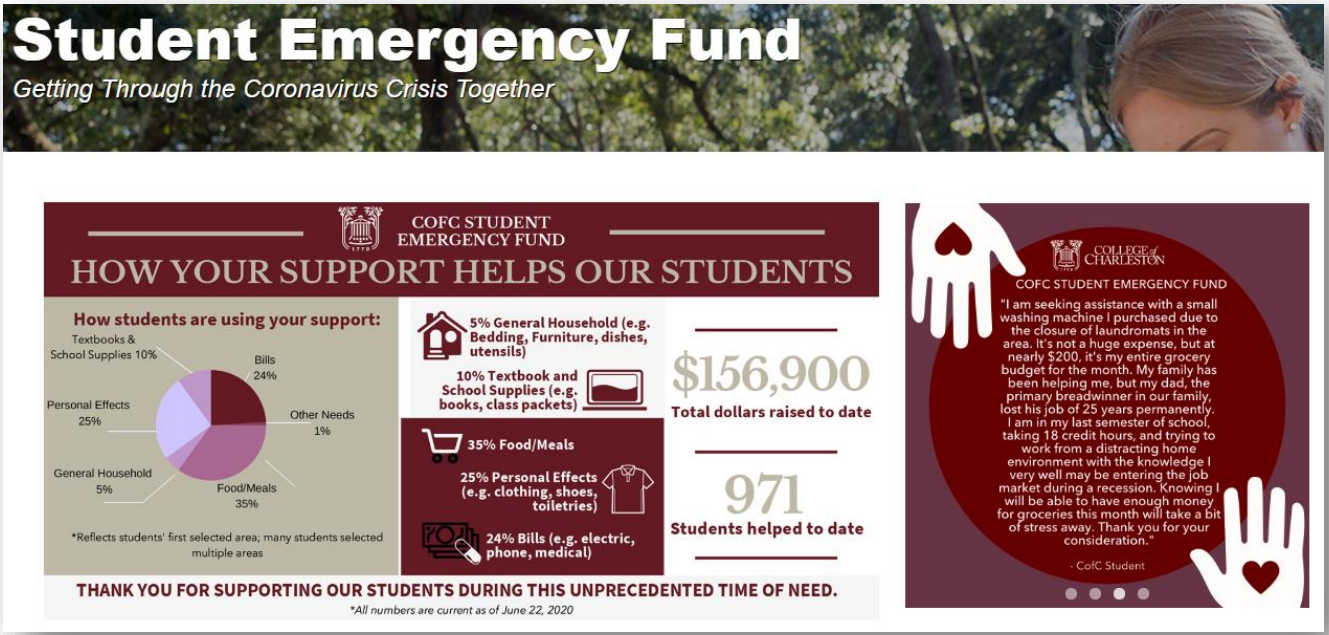
*Please accept our apologies for our previous email. We are testing a new email system and our previous email went out prematurely. We value your support as a Folds of Honor Wingman and hope you enjoy this update on the meaningful impact you're making.*

Dear Lynne,

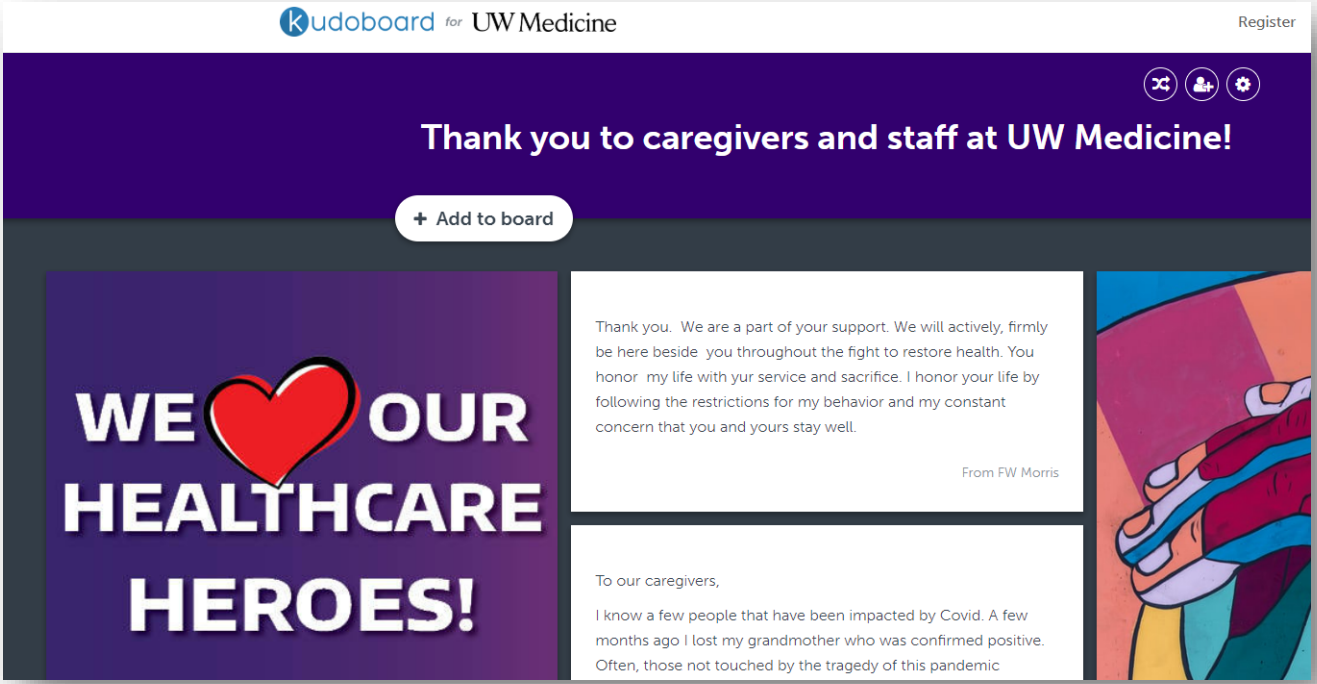
## $763,023

That's the amount raised last year by our squadron of Wingmen.
**That's 152 scholarships.**
**152 lives that will be changed thanks to dedicated Wingman like you.**
Your financial gift helps military dependents like Beatrice Gibson, whose father, Army Sergeant Ronald Gibson, developed Parkinson's disease after falling head first out of a helicopter attempting to save a comrade.

# Impact Communications




# Utilizing Web Assets




# Donor Interaction w/ Organization

# GIVING DAY DONORS: A CASE STUDY

@DonorGuru

- Pre-planning
- Targeted segments
- Pre-built communications templates and collateral
- Specific timeline of deliverables (day of, day after, 1 week after, etc.)

COMMUNITIES FOUNDATION of TEXAS NTX GIVING DAY

GIVING TUESDAY

UTSA GIVING DAY #BuildTheNest

EAST TEXAS GIVING DAY

Give Where You Live

ETCF

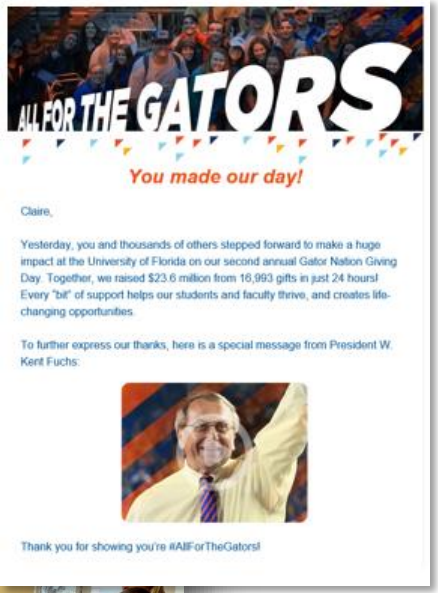
EL PASO GIVINGDAY.ORG

# KEYS TO SUCCESS

- Donor retention:
  - First-time donors and donors who made first gift through Giving Day last year
  - Faculty/Staff
  - 3, 4, and 5-year donors
- Enhance recognition programs
- Expand engagement with key prospects:
  - challenge donors, key volunteers, and managed prospects

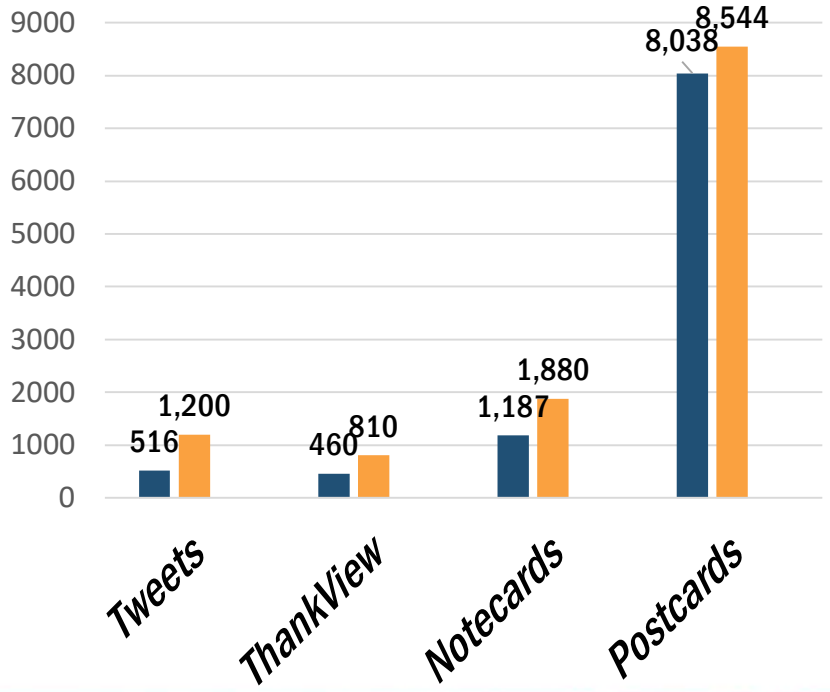
# HIGH PRIORITY AUDIENCES

- Handwritten notes from students
- General and personalized ThankView videos
- Personalized tweets / social media posts
- Post-event stewardship email with video from President
- Thank you postcards
- Giving Day specific tax receipts and acknowledgements



# KEY STEWARDSHIP DELIVERABLES (TIERED)

# Giving Day Touches




## RESULTS

- First time donor retention year-over-year
- Overall retention year-over-year
- Additional gifts within 1 year
- Number donor touchpoints / tiered
- Communication stats (open, click through, download, response, etc.)

# KEY METRICS

- Tackle one priority behavior per year
- Recognize behavior and giving trigger, don't mainstream all donors
- Flexible, timely, nimble
- Multi-touch, multi-channel communications
- Impact communications trump all
- Emotional giving = emotional stewardship

# KEY TAKEAWAYS

# Q & A

# THANK YOU!