



Stewardship Measures & Retention

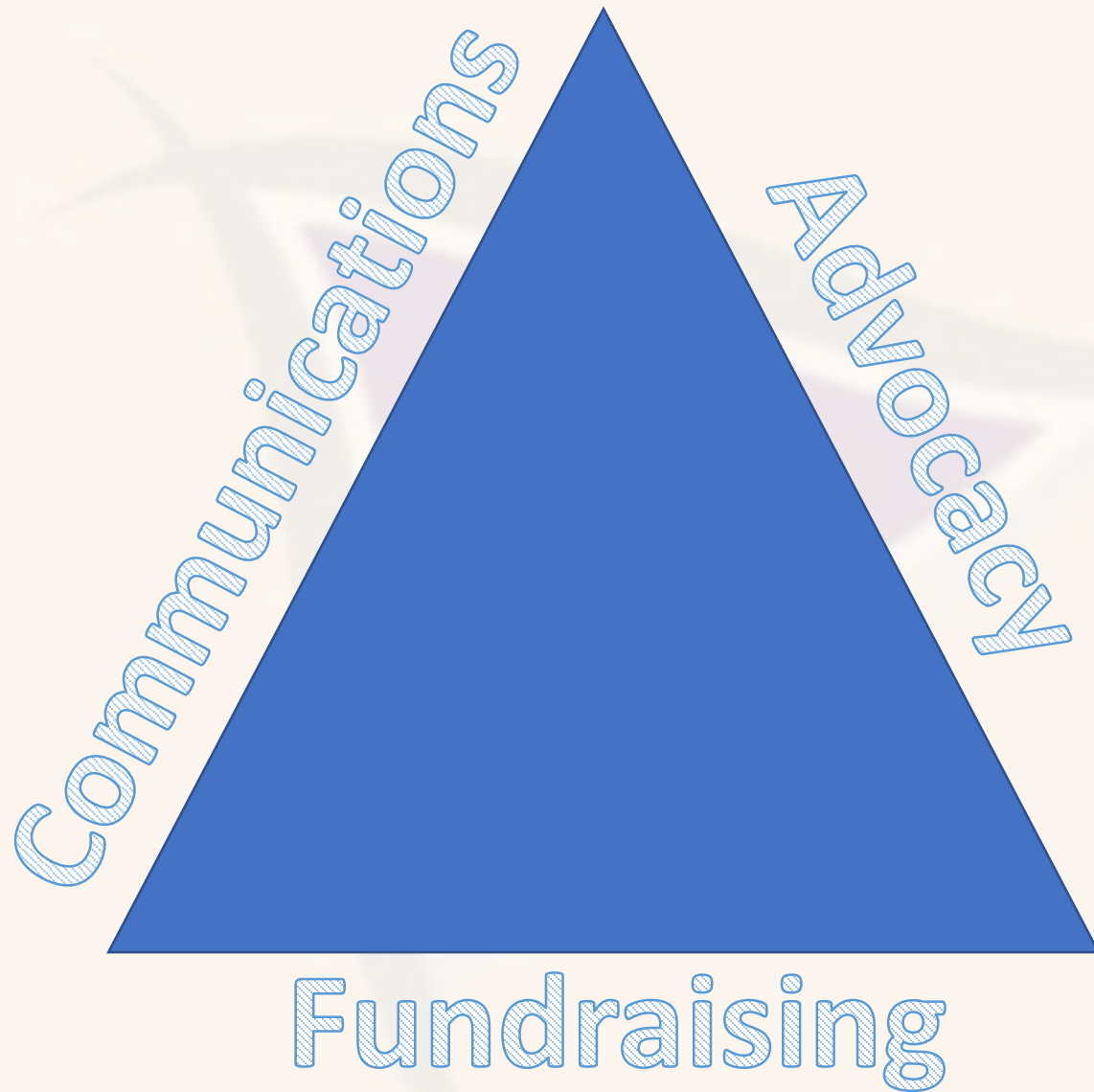
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Objectives

- Introduce general fundraising methods.
- Define the meaning of stewardship within the context of nonprofit donor relations management.
- Explore steps to providing a quality donor experience while decreasing donor churn.
- Offer best practices, resources, and tools that assist in donor retention.



Your Voice Matters

- Your perspective of your nonprofit's impact can either be the cheat code or the nail in the coffin
- Board members are the most visible champions for an organization
- Social media can be your lifeline when it comes to advocacy
- Use your personal story about the work being done to share the community impact
 - Don't be afraid to share that impact with those who you interact with regularly

Fundraising: Steps to Make it Happen

- Development plan creation
 - Is there a specific goal that you're looking to accomplish?
 - Capital campaign
 - Support for a new program
 - Event sponsorship
 - Context is key
 - Be knowledgeable about your programming
 - Proposed outcomes
 - Identify the who will perform what duties and how the plan will be carried out
 - Return on investment
 - Multiple streams are often necessary
 - Methods that work best for your organization
 - Who is your target audience?

Fundraising: Methods of Fundraising

- Grants

- Grantors are institutional donors and also require relationship management
- Yes, they're great:
 - Free funding
 - Often offered through corporate foundations, government, or larger NGO
 - No donor-centric involvement required
- But beware:
 - Time limited
 - Restricted funding
 - Struggle for programs that aren't shovel-ready

Fundraising: Methods of Fundraising

- Special event fundraising
 - Can include online or in-person efforts
 - Think outside of the box
 - Is the event a proper usage of manpower/time?
 - Requires a follow-up plan
- Sponsorships
 - Used for specific events, programming, or needs
 - Can be funded through individuals or companies
 - Often given in exchange for publicity or marketing on behalf of the company

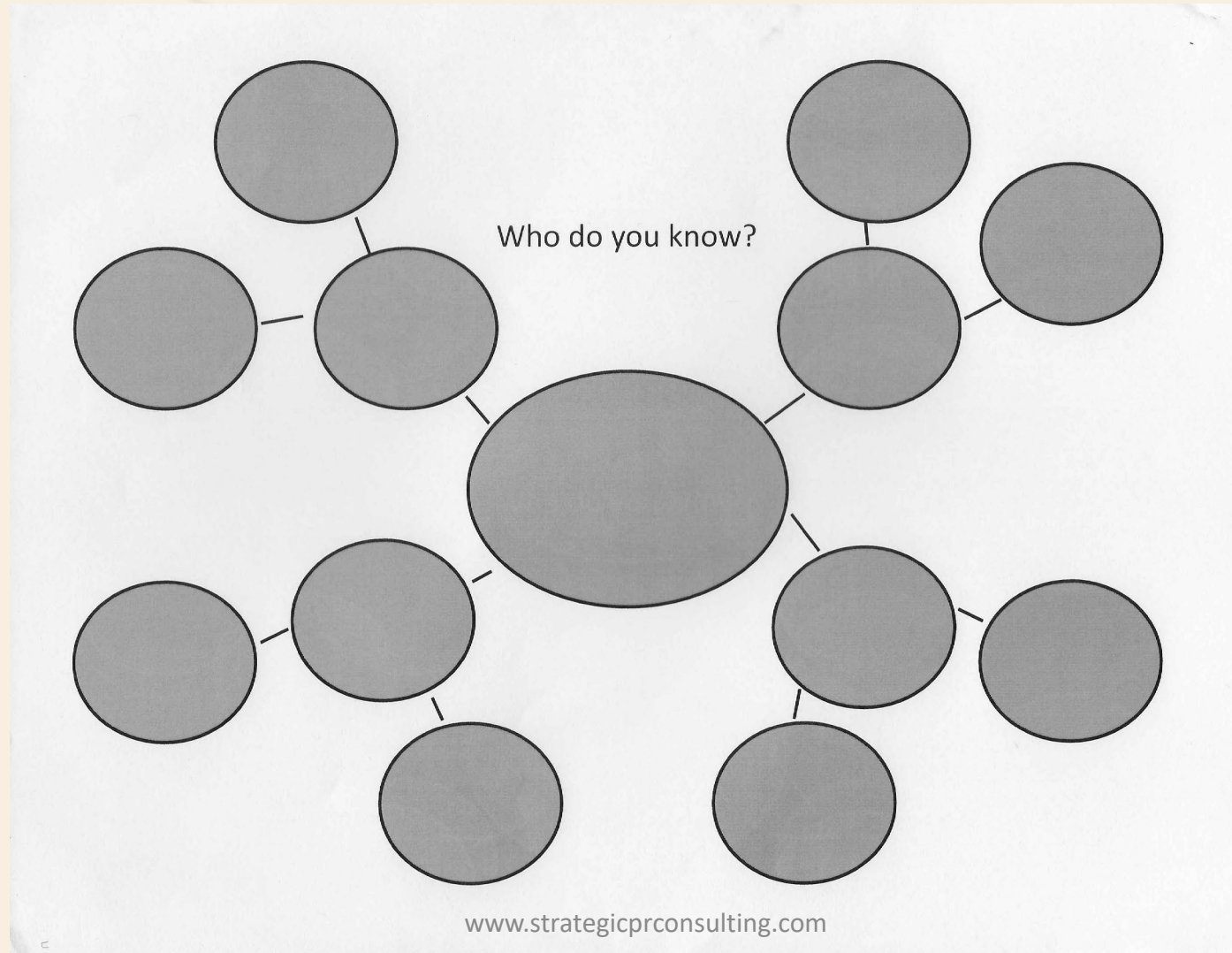
Fundraising: Methods of Fundraising

- Major Gifts Fundraising
 - \$1,000 and up
 - Emphasis on one-on-one fundraising
 - Be strategic in your asks based upon organizational needs and the interests of major donors
- Other methods of fundraising
 - Online giving
 - Social media fundraising
 - Crowd-sourcing
 - Workplace campaign
 - Payroll deductions, customer-based fundraising
 - Planned giving

Fundraising: Methods of Fundraising

- Relationship mapping
 - Who do you know?
 - What are their interests?
- Relationship building leads to donations
 - Major gifts fundraising should not be transactional
 - Focus on positive social experiences and engagements

Your Network's Net Worth



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Stewardship Redefined

What is stewardship?

- A process whereby an organization seeks to be worthy of continued philanthropic support, including the acknowledgement of gifts, donor recognition, the honoring of donor intent, prudent investment of gifts, and the effective and efficient use of funds to further the mission of the organization (AFP)
- The relationship-building process that starts after a donor contributes to a nonprofit organization (FreeWill).

Donor stewardship matrix

			New donors	Loyal donors	Major donors	Planned giving donors
	Communication type	Timeline				
Acknowledgment	Thank you email or call	Within 24 hours	✓	✓	✓	✓
	Thank you call from director	Within 48 hours			✓	
	Welcome letter	First week	✓			
Recognition	Annual donor lunch invite	Annually		✓	✓	✓
	Annual report listing	Annually			✓	✓
	Legacy society invitation	First month				✓
	Donor highlight in newsletter	Annually			✓	
						✓
Reporting	Video update of impact	Quarterly	✓	✓	✓	✓
	Impact report	Quarterly	✓	✓	✓	✓
	Update on gift use	Twice a year			✓	
Ongoing engagement	Volunteer opportunity	Quarterly	✓	✓	✓	✓
	Donor survey	Quarterly	✓	✓	✓	✓
	Holiday cards	November	✓	✓	✓	✓
	Donor summaries for taxes	Annually	✓	✓	✓	✓
	Gala invitation	Annually			✓	✓
	Donor anniversary	Annually	✓	✓	✓	✓
	Donor stories	Quarterly	✓	✓	✓	✓

Plan and Prepare for Donor Experiences

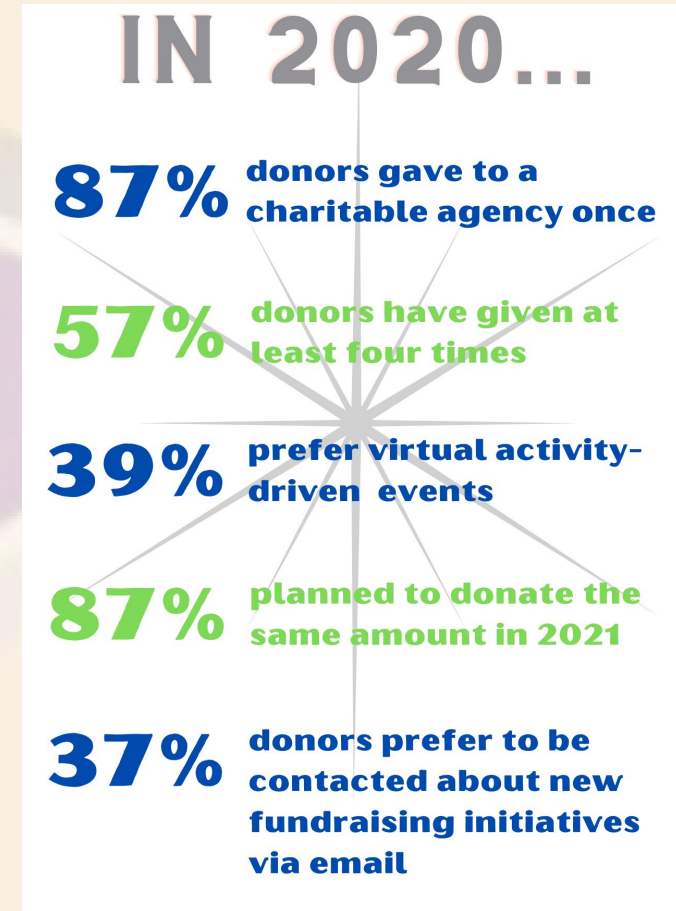
- Create a plan within your fundraising plan for effective stewardship
 - <https://www.networkforgood.com/resource/crash-course-your-7-step-fundraising-plan/>
 - Incorporate other stakeholders into the plan
- Reflect on your past year
- Identify existing resources
- List activities to attract, renew, and upgrade donors
- Create goals for each activity
- ID three focus points
- Put your plan on the calendar
- Set yourself up for success

Plan and Prepare for Donor Experiences

- Identify your target audience members through donor segmentation
 - “Data segmentation powers stewardship!”- AFP Global
 - Frequency of gift, size of gift, method of giving, etc.
 - These are the donors who travel the journey with you
 - Your imperatives may change, but they are drawn to the core mission
 - Develop a strategy to engage them at their levels
 - First timers: welcome kits, surveys/in-person (or virtual) visits, organization tour
 - Consistent donors: focus on the months/years of support, deepen engagement through year-round opportunities
 - Major donors: ideal for ad-hoc committees, steering committees, advocacy needs
 - Lapsed donors: newsletters/updates on progress made since they’ve last contributed, phone call (just ask!)

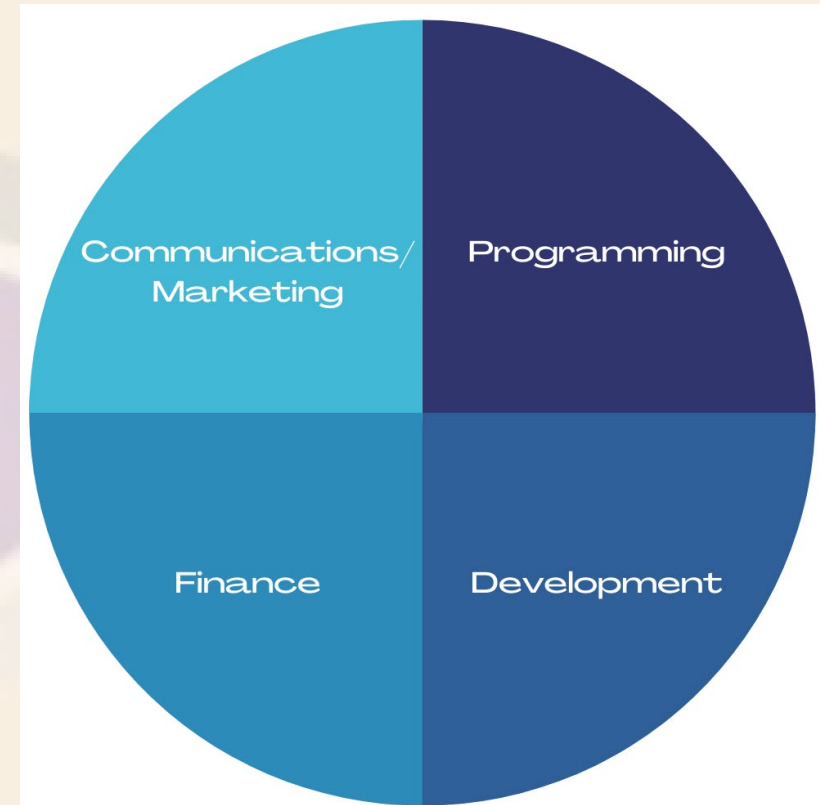
Plan and Prepare for Donor Experiences

- Decipher engagement techniques to retain donors
 - Events
 - Highlights/recognition
 - Routine check-ins



Plan and Prepare for Donor Experiences

- Stewardship is a “total organization” process
 - Each department has the capability to engage donors
 - Create systems that aid in building relationships with supporters



Plan and Prepare for Donor Experiences

- Relationship evaluation
 - Creates benchmarks for fundraising cycle (conduct research through segmented populations)
 - #QTNA:
 - Make the other ask: How are we doing?
 - What made them choose you this year?
 - What is your organization doing well?
 - Where are your areas of opportunity?
 - Talk about it!
 - Being vulnerable with your donors about funding struggles, things you've celebrated, and projects that couldn't take flight provides in-depth support of your imperatives

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Applied Stewardship

Best Practices

- Date your donors!
 - Get to know them outside of what they can do for you
 - Know the range of the audience
- Donor saturation
 - Multi-dimensional involvement
- Rules of engagement (It's not just a great movie!)
 - Donor retention is at the core of your fundraising plan
 - Stewardship is an investment in your organization
- Data fuels your work
 - Spend the time to input data and keep records of your interactions with donors

Best Practices

- Donor retention is **NECESSARY!**
 - Staff and volunteers play a role
- Grow new donors/lower-level donors
 - Donor churn
- Authentic engagement
 - Keep the donor informed
 - Routine updates make the difference
 - Use of personal touches (text messages, hand-written notes, etc.)

Great Resources

- Association of Fundraising Professionals
 - Fundraising Effectiveness Project
- Frontstream
- Nonprofit Quarterly
- Bonterra
- Quality reports from your own database!
- People (staff, donors, vetted volunteers)
- What are some of YOUR favorite resources/tools?



Contact Me!

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