



BEYOND THE DONATION-
TURNING EOY DONORS INTO
YEAR-ROUND SUPPORTERS



Solution

Smart Steward Method

An iterative approach to building and nurturing relationships, using data-driven insights and timely actions to create meaningful, lasting connections.



Productivity

Be more productive and know what to do every day



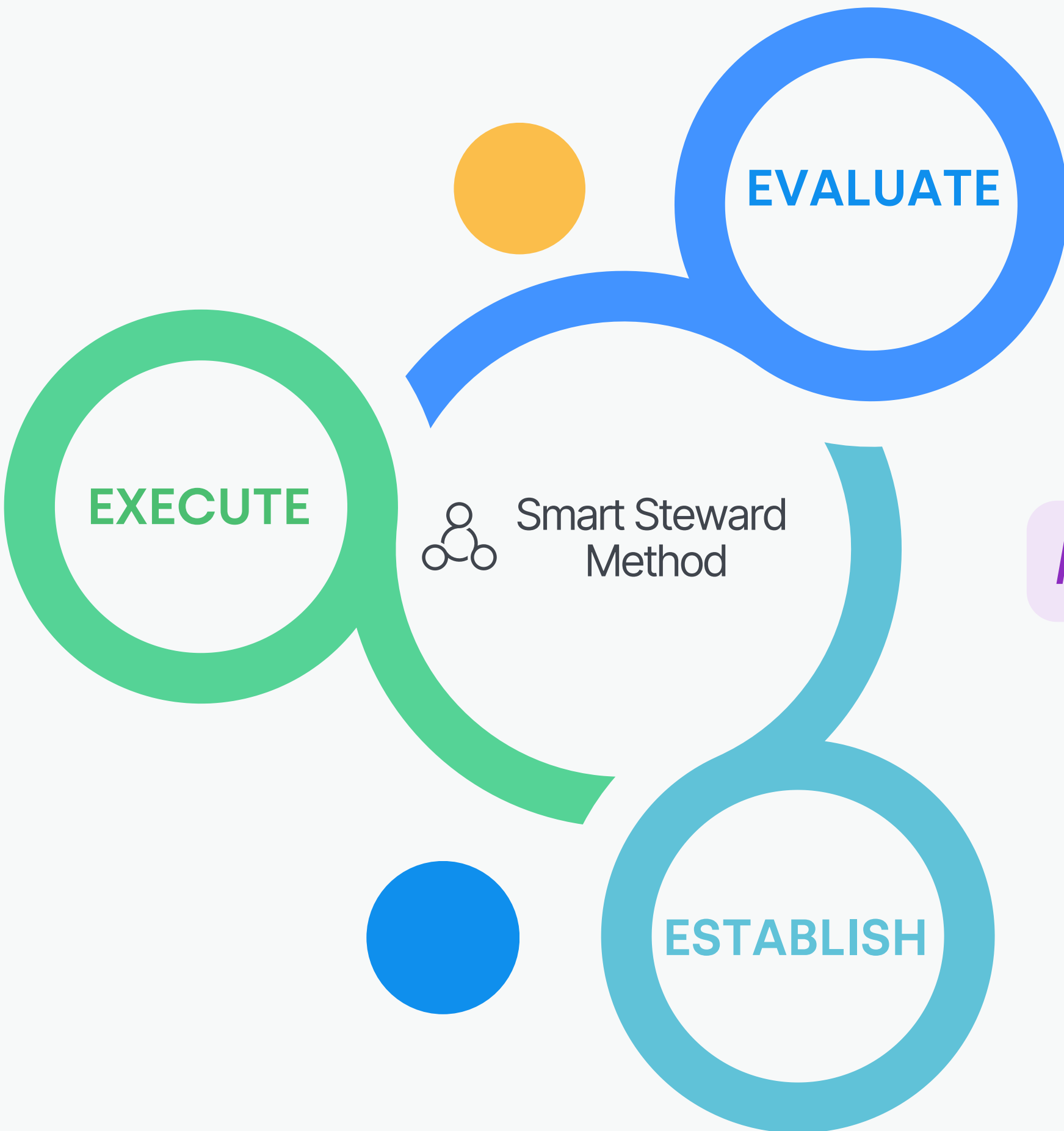
Confidence

Be confident knowing the work you are doing is making a difference



Experience

Align your donor's experience with their expectations even as you grow



Today we will:
Understand what data to review post-EOY.

Know how to thank and retain new donors.

Identify early-year engagement and stewardship opportunities.

Why This Matters

The EOY Rush Is Over, But Donor Relationships Are Just Beginning

- Nearly 30% of annual giving happens in December.
- Yet most nonprofits lose over half their donors by the next year.
- **The secret to success:** what you do after the campaign.
- ➡ January isn't the end — **it's your biggest opportunity.**

But First...



*Take a
deep
breath*

After the year-end giving rush, nonprofits need more than data reviews — you need a collective breath.

Taking time to reflect, rest, and celebrate isn't a luxury; it's a strategy for retention, resilience, and renewed purpose.



EVALUATE

Measure More Than Money

What worked? What didn't?

Metrics to review:

- Total revenue
- New vs. Repeat Donors
- Retention Rate
- Average Gift Size
- Reactivated Donors from Lapsed

Look for patterns, not just totals.



EVALUATE

Turn Lessons into Strategy

💡 **Bonus: Supporting Metrics to Track**

- **Reactivation Rate:** % of lapsed donors who give again.
- **Response Rate by Channel:** Email vs. phone vs. direct mail.
- **Average Gift from Reactivated Donors:** Compare to active donor average.
- **Retention of Reactivated Donors:** How many stay active after 6–12 months.



ESTABLISH

Turn Lessons into Strategy

- **Set SMART goals for 2026 Donor Engagement.**
 - 🧩 “Increase recurring monthly donors by 25%, through a segmented follow-up campaign to EOY donors.”
- **Watch retention, not just revenue**
 - 🧩 “Increase overall donor retention from 42% to 50% by launching a segmented stewardship plan with donor journeys.
- **Identify Lapsed Donors Early**
 - 🧩 “Reactivate 15% of donors who last gave in 2024 by implementing a personalized, multi-channel re-engagement campaign.



ESTABLISH

Turn Data Into Insight

- **Identify your most engaged donors.**

- Activities
- Gifts
- Program Designation
-

- **Donor Segmentation**

- Reactivated Donor
- First Time Donors
- Lapsed Donors
- Major Donors
- Mid-Level Donors

- **Use Insights to Guide your Q1 Outreach**

- Personalization
- Enroll in Journeys



EXECUTE

Keep the Energy Going!

- **Don't disappear after EOY!**
- **Stay visible in Q1 with updates like:**
 - "Here's what your gift made possible"
 - "We're planning 2026 together"
- **Combine impact storytelling with data-driven engagement.**

***Stories engage the "heart,"
Data validates the "mind."***



EXECUTE

Gratitude Builds Loyalty

Donors who feel appreciated give again — and give more.

Thanked donors are 51% more likely to give again

- **Send Thank-Yous That Are:**

- Timely
- Personal
- Impact-focused

- **Segment Messages For:**

- First-time donors
- Recurring supporters
- Major givers
- Reactivated from Lapsed



EXECUTE

Save Time, Stay Genuine

- **Automate Thank-you Emails without Losing the Human Touch.**
 - Use personalization, merge tags, and segmentation.
 - Communication preferences.
- **Schedule Follow-ups and Reminders**
 - Donors receive communications at the right intervals, keeping them connected to your mission.
- **Track Who Engages and When**
 - Update your data

Personalized thank-yous can increase donor retention by 39%.

*Donors who are thanked promptly
are four times more likely to donate again.*

First Time Donor Journey

**Immediate
Acknowledgment &
Gratitude**

Day 1

- Automated email thank you
- Personal thank you and welcome (phone call, text, handwritten letter)

**Personalized
“Welcome to Our
Mission”
Communication**

Day 6

- Welcome Email or Direct Mail
- Share a quick overview of your organization’s story, vision, and key programs.

**Share a Success
Story or Behind-the-
Scenes Look**

Day 14

- Impact-Focused Content: Send an email or letter that highlights a recent success story, beneficiary testimonial, or behind-the-scenes look at how you operate.

**Invitation to Engage
Further**

Day 30

- Personal Touchpoint - share appreciation
- Invite to event
- Emphasize that attending an event or volunteering is as important as financial support.

**Recap & Second Gift
(or Recurring Gift)
Invitation**

Day 60

- Impact Recap: Summarize what’s been accomplished since their first gift
- Suggest a second one-time gift or encourage them to consider recurring giving.

Recurring Donor Journey

**Enrollment &
Immediate
Gratitude**

Day 1

- Send an automated email or letter confirming their enrollment
- Clearly state how monthly gifts create stability
- Provide a tangible example (e.g., "Each month, you help us feed 10 children")

**Personal Touch
& Mission
Integration**

Day 6

- Email, phone call, or postcard that explicitly thanks them again for choosing to donate monthly
- If possible, mention their first month's gift was put to immediate use (brief example if you have one)

**First Milestone
Check-In**

Month 3

- Send an email or letter highlighting what monthly gifts have collectively accomplished in the last quarter
- Personal Connection (Optional) - Phone call, text, meeting

**Midpoint
Stewardship & Soft
Upgrade Invite**

Month 6

- Send a "6-Month Thank You" email or letter
- Include a gentle suggestion to consider increasing their monthly amount

**Deeper Engagement
& Community
Building**

Month 9

- Send exclusive content or event invite
- Send a thank you and reinforce their value

**12-Month
Anniversary
Celebration**

Month 12

- One-Year Anniversary Thank-You
- Renew or Upgrade Invitation
- Personal Call or Note (Optional, if feasible)

Mid-Level Donor Journey

Identification &
Personal
Acknowledgment

Day 1

- “Welcome to Mid-Level” Personalized Thank-You
- Introduce a Point of Contact - “Name a specific staff member or development officer who will be their go-to for questions or updates.”

Introductory
Touchpoint &
Mission Alignment

Day 7

- Personal Outreach - A short call, handwritten note, or personalized email
- Mission Overview or Impact Report - highlight where mid-level donors have specific influence.

Deeper
Engagement &
Impact Showcase

Month 2

- Share a Success Story or Program Update
- Invite Feedback or Questions

Exclusive Event or
Insider Access

Month 4

- Invite to a Special Event/Briefing
- Show Tangible ROI
- Point out exactly what donor contributions have funded.
- Spotighting the donor’s impact.

Potential Upgrade or
Next-Level
Involvement

Month 7

- Check-In Call or Email
- Soft Ask or Upgrade Conversation
- If donor engagement is strong (attending events, responding to emails), consider suggesting a higher level of commitment.

Annual Check-In &
Renewal

Month 12

- Comprehensive Impact Recap
- Invitation to Renew or Increase
- Personal Gratitude Gesture

Major Donor Journey

**Immediate &
Personalized
Acknowledgment**

Day 1

- Personal Thank-You
- Confirmation of Next Steps
- Optional Public Recognition

**Secondary Gratitude
& Team Introduction**

Day 7

- "Second Wave" Thank-You
- Key Contacts Introduction

**Early Impact Update
& Relationship
Building**

Month 2

- Short-Term Outcomes
- Personal Touchpoints
- Consider a site visit, virtual walkthrough, or a small reception if feasible.
- Invite Dialogue
- Encourage their feedback or questions.

**Mid-Project (or Mid-
Year) Progress
Report**

Month 6

- Detailed Progress Update
- Show Gratitude Again

**Deeper Involvement
& Leadership
Invitation**

Month 9

- Leadership or Advisory Role
- Exclusive Opportunities
- Two-Way Exchange
- Ask for their feedback and ideas. Major donors often enjoy being partners in solving problems, not just funders.

**Ongoing
Stewardship & Long-
Term Engagement**

Month 12

- Annual or Biannual Check-Ins
- Continuous Feedback Loop
- Legacy & Planned Giving
- Once the relationship is solid, you may broach the topic of legacy gifts or endowments

Lapsed Donor Journey

**"We Miss You"
Postcard or Email**

Day 1

- Warm, Grateful Tone
- Simple Update
- Low-Pressure Re-Engagement

**Impact-Focused
Letter (or Email) with
a Light Ask**

Day 7

- Personal Note
- Soft Ask
- Emphasize Urgency/Opportunity

**Personal Outreach or
Phone Call**

Day 45

- Phone Outreach (if feasible)
- Alternative: Personalized Email or Handwritten Note
- Offer support options

"We Still Value You"

Day 60

- Final Attempt
- Offer Non-Monetary Engagement
- Polite Off-Ramp

**Minimal or Inactive
Communications**

Day 120

- Update CRM
- Label them as "Inactive" or "Do Not Solicit" (if they requested it).
- Be Ready to Reactivate

Simplify Donor Management

- Centralize donor data
- Automate outreach and reminders
- Track engagement
- Measure impact



THANK YOU

For Attending Today!

Resources:

<https://www.donordock.com/fundraising-bootcamp>

<https://www.donordock.com/smart-steward-method>