

SURPRISING AND DELIGHTING DONORS: MASTERING YEAR-END STEWARDSHIP STRATEGIES

BY SABRINA WALKER HERNANDEZ

ABOUT ME

I studied Political Science and Public Administration.

I obtained a Nonprofit Management Certification from Harvard Business School.

For the last three decades I have worked in the nonprofit industry in direct services, operations and executive leadership.

I train CEOs, Boards of Directors, and Employees across diverse sectors in leadership skills, focusing on revenue, relationships, & retention. 🌟 | Keynote Speaker, Facilitator, Coach, Author & Strategic Planning Expert.





WHAT I DO

- Workshops & Webinars
- Board and Staff Retreats
- Keynote Speaker
- Executive Coaching
- Consulting



WHAT IS STEWARDSHIP?



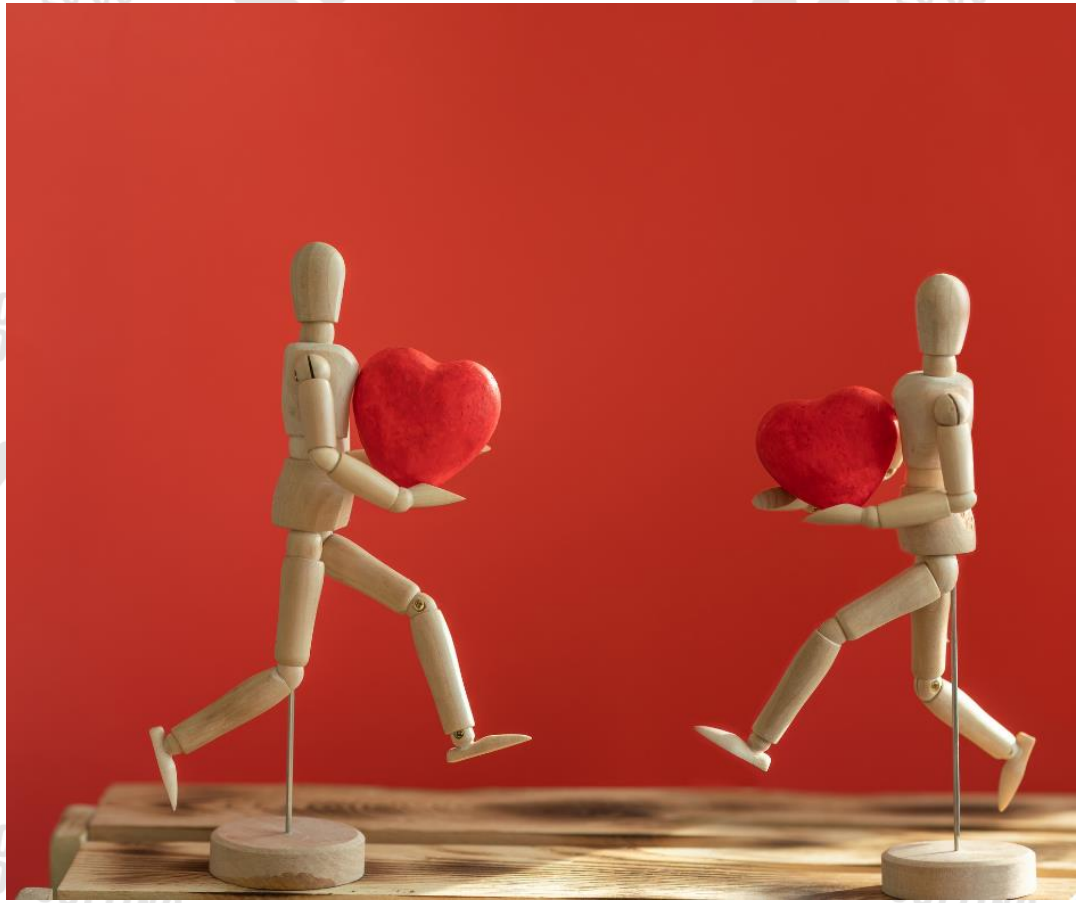
“Stewardship” is acknowledging, recognizing and maintaining the good relationship with people who have given a gift to your organization.”

The Case for Stewardship

In a study conducted by Penelope Burk, Board members called to thank donors within 24 hours of receiving the gift. The next time the donors were solicited, those called gave 39% more than the other donors who did not get called. After 14 months, those called were giving 42% more than the other donors who did not receive phone calls.

What Happens Without Stewardship?

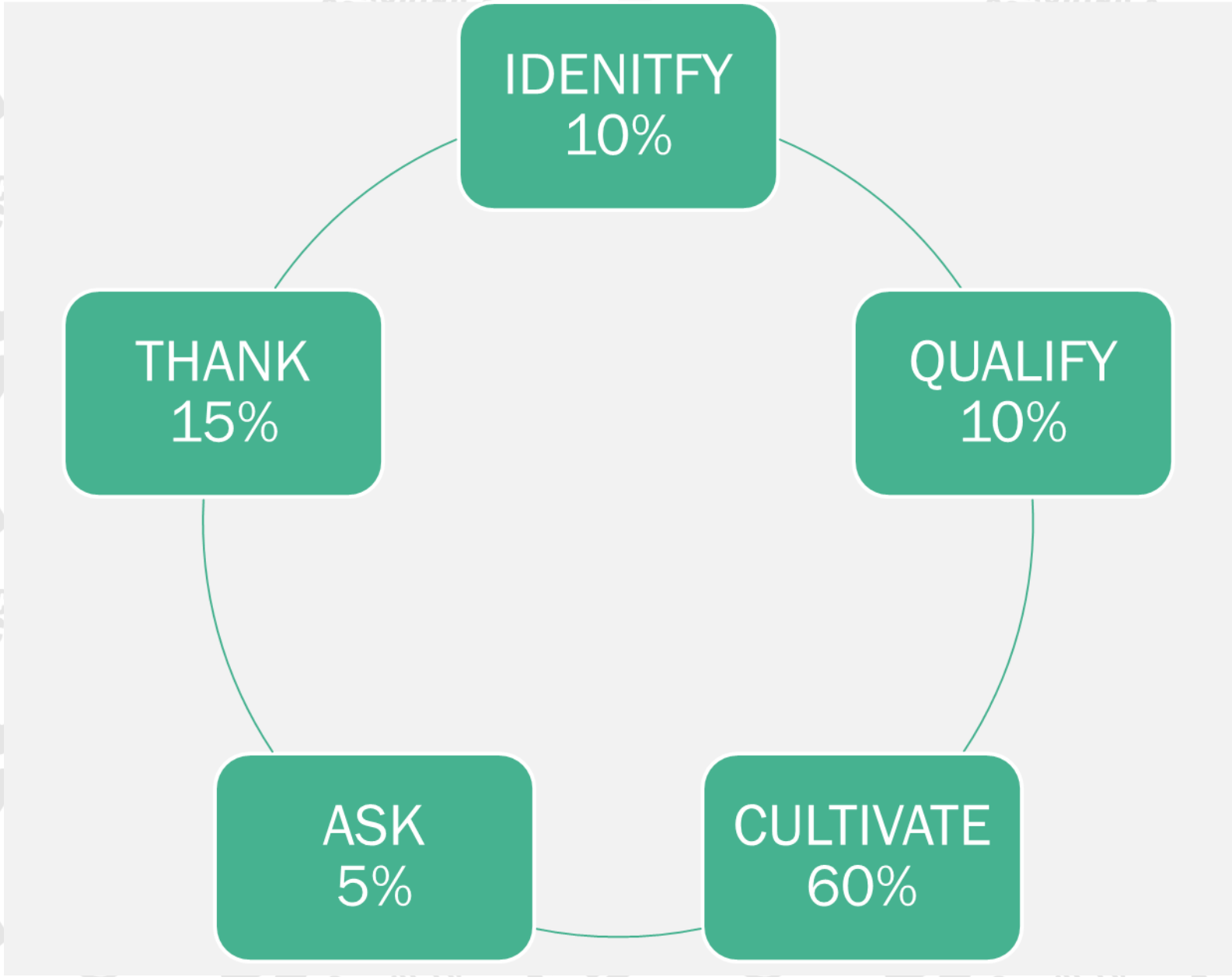
- Surprises at the next solicitation
- "I never hear from you except when you want money"
- "My acknowledgement was slow in coming (or inaccurate)"
- "You didn't use my gift as I had designated it"
- People stop giving



The Value of Stewardship

- Stewardship helps insure future support
- Stewardship offers legal and public protection
- Stewardship strengthens board and volunteers
- Starts cultivation for next gift
- Moves from gift as events to giving as relationship
- Builds trust and credibility
- Changes dynamic from nonprofit centered to donor centered
- Donors see a good return on their investment and want to invest more
- Stewardship is the right thing to do

Relationship + Results = Recurring Revenue (Retention)



Fundraising Process

The 3 Ps of successful donor retention

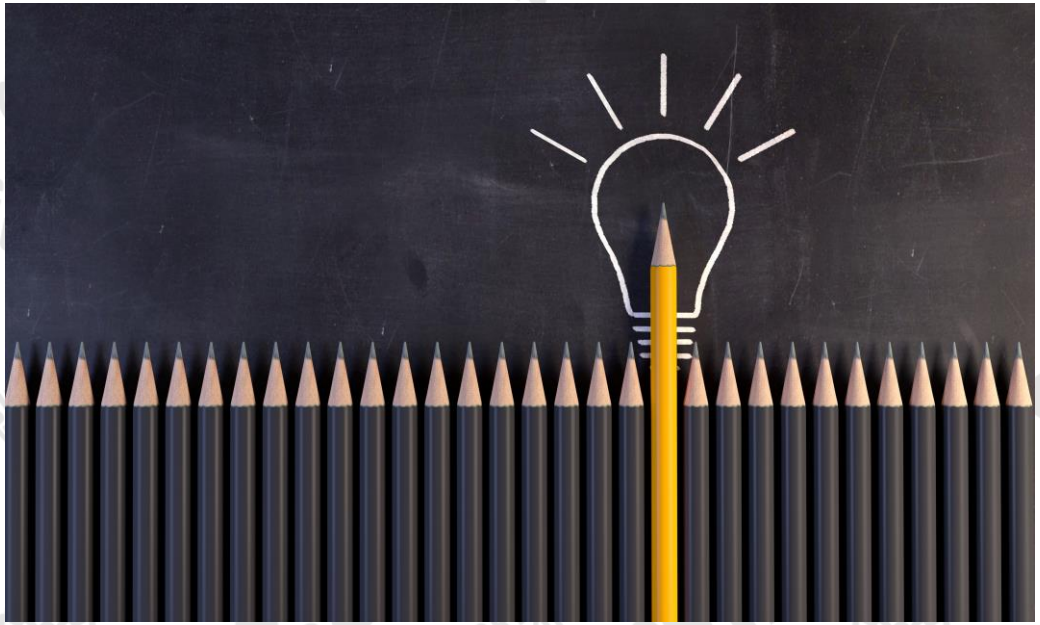
If nonprofits do just these three things' donors would likely give again or give more.

- Prompt thank you.
- Personal thank you.
- Powerful demonstration of gift’s impact.

The more you can incorporate the 3 Ps into your ongoing donor acknowledgement, recognition and communications, the greater success you will have in retaining and upgrading donors.

1 IDEAS TO GET YOU STARTED

- Host a board Thank-a-thon
  - Identify your top 20-50 donors
  - Designate 20 minutes of a board meeting time to make calls to those donors.
  - Make it easy for board members give them a script.
  - Reconvene after 20 minutes and share out.



PERSONAL CONNECTION

- Donors need to connect to a human being, because they need to feel an ongoing connection. Otherwise, they're unlikely to repeat their gift.
- The more personal, the better.
- Not a mass email holiday greeting.

- But a report that says "*Dear Sarah, I think what you did was wonderful. Now Mary and her kids can sleep through the night.*"

2 IDEAS TO GET YOU STARTED

1.Set up a personal visit. This won't make sense with every donor, but for folks who you're cultivating for a major gift or significant upgrade it's the very best thing you can do.

2.Send a video thank you. You can record it yourself using your smart phone, with just you talking, waving and smiling.

3.Send a video from someone your donor's gift made possible.

4.Send a note from someone your donor's gift made possible. It can come from a client, a guide dog, a painting, a bag –get creative!



POWERFUL DEMONSTRATION OF IMPACT

Donors don't care about what you do. Those are activities.

Donors don't care about how many people you serve. Those are outputs.

Donors want to understand the impact of your work.
Donors want to know who is being helped. They want to know how lives are being changed. And they want to know how their investment in your nonprofit is making a real difference in the world.

POWERFUL DEMONSTRATION OF GIFT'S IMPACT

- Your donors want to hear stories about your successful outcomes. They want to know how their investment had an impact.

- So, collect, organize and share amazing and inspiring stories with your donors.

- Share these stories in your donor newsletter. In your annual report. In your social media feeds. When you meet with donors. And, again in the thank you letters.

POWERFUL DEMONSTRATION OF GIFT'S IMPACT

- You must **connect the dots** between your donor's gift and actual impact. Donors want to know what their hard-earned money is accomplishing! How do we know this, because donors tell us:

- **53% of donors do not renew their giving is because the organization failed to properly communicate in one way or**

- **another** (Bloomerang, "Nonprofit Donor Loyalty Primer" Infographic via Dr. Adrian Sargent, "Managing Donor Defection").

- **46% of donors leave for reasons tied to lack of meaningful info** or to a feeling their giving is not appreciated (Penelope Burk, Donor-Centered Fundraising).



POWERFUL DEMONSTRATION OF GIFT'S IMPACT

60% want impact and success stories – and say their decision to give again hinges greatly on the organization's ability to show what it can accomplish. (Software Advice; see also The 2013 Millennial Impact Report. Achieve. The Case Foundation.)

70% of donors would increase their investment if they received what they needed from charities (Penelope Burk, Donor-Centered Fundraising).

75% of donors use information about a nonprofit's impact in their giving decisions (Informed Giving: Information Donors Want and How Nonprofit Can Provide It. Root Cause. 2013).

75% of donors list "information on results achieved with their gifts" as their top requirement to motivation for future giving (The Burk Donor Survey. Cygnus Applied Research, Inc. 2013).

3 IDEAS TO GET YOU STARTED

1. Include mission moments in all your board and committee meetings and volunteer activities. They need to hear stories about the people they're helping.

2. Add a video with testimony from someone helped to your website, e-newsletter, blog and/or email signature.

3. Add testimonials from people helped to your donor honor roll and/or share via social media.



ONGOING ENGAGEMENT

- Ongoing communication is the foundation of REAL donor love.
- Absence does not make the heart grow heart fonder.
- You want to avoid giving your donor the impression you don't really care that much about them.
- You know the feeling? The one you get when friends get busy, and forget to call or write? Eventually, you stop thinking about each other.

The goal is to stay top of mind!

ONGOING ENGAGEMENT

Don’t be afraid to reach out more than a few times.

Connect emotionally on a frequent basis.

Donors need to be *reminded* how their money is being applied toward results that are lasting and effective.

Donors *want* to hear from you if you:

- make them feel awesome
- report on outcomes they care about
- make them feel “in the know” and “part of a special community”
- ask for their feedback/opinions/advice.

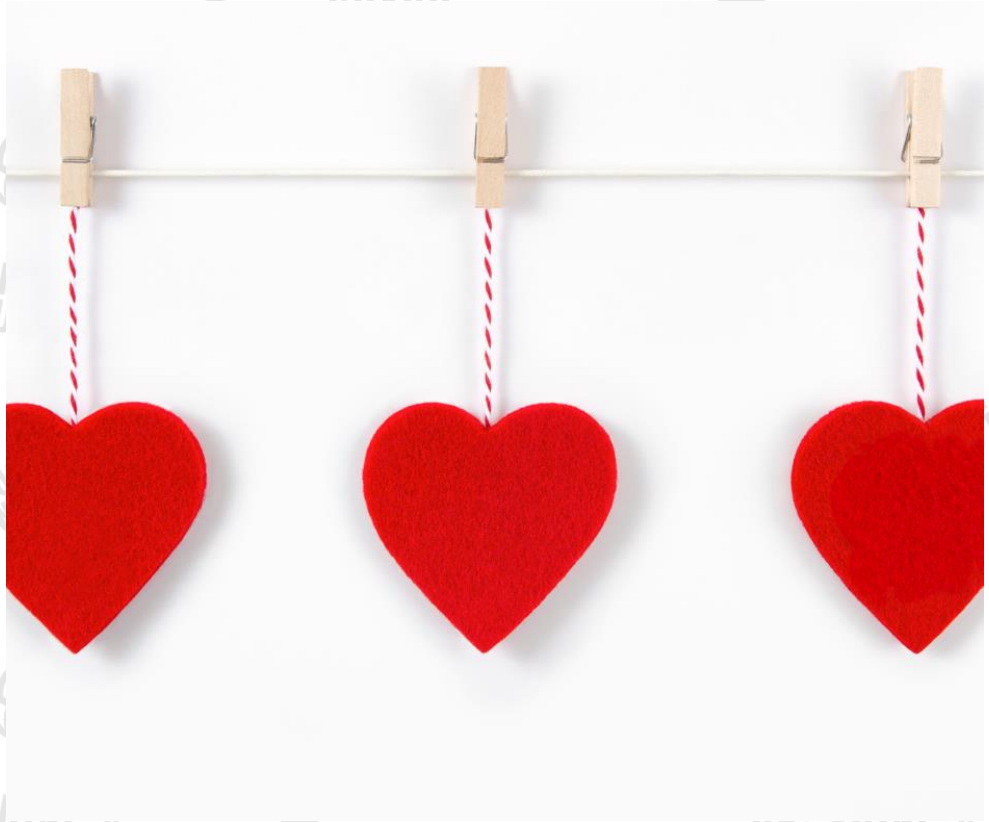
Holiday Surprise and Delight

There are several ways you can thank your donors this holiday season. No matter your budget and no matter which stewardship pieces you choose, your authenticity makes a difference.

Your donors will get holiday cards from family and friends that don't include a personal message—make your stewardship personal; give donors that extra dose of warm fuzzies this holiday season.

Year-End Strategies-Individuals

- Face to face is ALWAYS best
- If face to face isn't possible, consider who is the best messenger and what is the best medium
- Remain donor-centered
- Identify the top 25-50 donors - Steward your top donors-whether they've given yet or not
- Treat Board members like donors first



Special / personalized messages for:

- Monthly Donors
- Planned Giving Donors
- Major Donors
- Board Members
- Donor Advised Funds

Thanksgiving



"Thanks" is literally in the name of this holiday! Show you donors that you are appreciative of them.

Ideas

- Engage Your Board of Directors To Make Phone Calls
- Enlist The Help Of Those You Serve
- Send A Letter Highlighting Impact
- A Simple "Thank You" Card
- Surprise them!

Christmas

Holiday-themed stewardship event

Invite your donors to take a break from shopping and office parties with a holiday-themed, family-friendly stewardship event hosted by your organization. Maybe your organization provides housing and could host donors and their families for an afternoon of gingerbread house decorating. Does your organization work with animals? Have donors come by your office to make holiday-themed treats for their favorite furry companion.

Get creative.



Christmas

Poinsettia or plant delivery

Book more visits by telling your donors you want to drop by with a holiday card and a small token of thanks. Poinsettias are a great holiday plant that donors can enjoy around in their office or home. Plus, if you get organized in advance, you could get poinsettia donations from a local florist or nursery.



Christmas

Holiday cards

Who doesn't love receiving snail mail these days? I do! Adding in a holiday card for your donors is a great way to get in an extra stewardship touchpoint when donors are in a celebratory mood. If your nonprofit is on a budget, you can use free sites like Canva or PicMonkey to design a branded holiday card, or purchase brand-neutral cards at the store.



Whatever you decide, we always recommend adding in a short-handwritten note to card. Ask your staff and board members to take on a stack of cards to distribute the workload. You can even make it a social team-building opportunity and have a card writing party one afternoon at the office.

Christmas

Thank You Video

Thank You videos are an effective stewardship touchpoint, that can scale to all your annual giving donors. As you script your video, bring elements of the holiday season into how you'll thank donors. Use the holiday decorations around the office and film on location. Make sure you include your clients.

Don't be intimated by the tech. You can create a great video with your phone and edit it with a free software like Kapwing.



Christmas

Re-write a holiday song or story
This is a fun idea for stewardship? Consider rewriting a holiday song or story as a stewardship touchpoint.

Think Twas a Night Before Christmas

Get those creative juices flowing!



Christmas

Holiday-specific stewardship
If you know certain donors celebrate Kwanzaa, Hanukkah, Christmas, or any or none of the November-December-January holidays, consider developing a holiday-specific and culturally relevant stewardship piece.



New Years



New Year's cards

Consider sending New Year's cards to donors. You'll stand out. If you want to save time and put a pre-printed message in your New Year's cards, make it a visionary, forward-thinking note about what your nonprofit and donors can do together in the coming year.

How to take advantage

- Zero in on the **old-fashioned**, **corny** look and feel of the holiday.
- Tap into people's **nostalgia** and **memories.** This is what **tugs on their heart.**
- Key into **donor expectations** around the holiday, and mak your stewardship reflect this (e.g., turkey clip art; holly clip art holiday colors).
- Talk about people's **traditions**. The food they remember eating. The images they remember coloring in grade school.





50% of nonprofits receive most of their annual donations between October and December.



People are in a gift giving mood during December. In fact, 30% of all annual giving happens in December, and 12% of all giving happens in the last three days of that month!

Thank You!

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