

PATHWAYS TO EXCELLENCE: BEST PRACTICES IN FUNDRAISING & RESOURCE DEVELOPMENT

DONOR RETENTION TIPS

Presented on 1/22/15 by the [Nonprofit Coordinating Committee of New York](#) with Amanda Kraus – Executive Director/ Founder, [Row New York](#); Karen Pearl – President/CEO, [God's Love We Deliver](#); facilitated by Judy Levine – Executive Director, [Cause Effective](#)

I. “Let’s talk about you”: Get to know the mind of your donor

- People don’t keep giving to organizations that don’t give something back. They give to causes that resonate with them personally. You need get to know them to understand their motivations, assure them their gift is appreciated, and to meet their expectations for recognition.
- Start with your largest donors – invite them to sit down with you in a convenient location and ask “Why do you give? What about us makes you feel good?”
- This leads into a conversation about who they are, their families, businesses, and children.
- Ask questions, capture the answers – and care about those answers. Make sure you capture all the information in your database, or even on a spreadsheet, so that a year from now when you sit down with the same person, you can ask, “Is so and so feeling better?” or “Which college did your daughter end up choosing?”
- These conversations build a relationship and tell you what the donor likes – if they like phone check-ins, hate email, or love house parties.
- Tailor how you communicate with that donor and steward them in a way that makes them feel closer to your organization, but not overwhelmed.

II. “Meet me – online?”: Interact attentively with donors

- A meeting with a donor should be about learning about them – figuring out their interests and being guided by what they want to talk about.
- Donors will have all kinds of ideas about what your organization should be doing. Some good, some not so good. Listen diplomatically. You don’t want to shut them down by telling them their ideas won’t work. Instead, acknowledge their idea, then tell them more about areas of your program that relate.
- Learn your donors’ individual tastes for styles of communication and interaction. Have different events or engagement opportunities that match the diversity of your donor community.
- Social media campaigns can be low-cost ways to engage donors as advocates and reach people unfamiliar with your organization. But don’t start what you can’t finish: the challenge is maintaining the engagement once they respond.
- More and more donors are donating online, and it’s a rare donor today that doesn’t look at your website. Think about what your website – your virtual front door – looks like from the donor’s point of view. What image does it project and what are the users’ experiences as they seek to donate or learn more about where their donation goes?

III. “Thanks ... again!”: Move from the first gift to a repeat gift

- The first gift is very important – this person just made a commitment and it’s an essential time to catch them.
- Every donor, no matter how big or small their gift, should get a signed letter of thanks from the Executive Director or Chief Development Officer.
- Gifts of \$500 or more (or whatever the line is you draw) should get a handwritten note. That will let them know you are paying attention.
- If a donor’s gift increases, note that in the formal letter and in the handwritten note. The Executive Director might want to meet with this person, to find out what led them to increase their commitment to the organization. The

steps are: i) thank them; ii) find out what's going on; and iii) see if there is a more engaged role they would want to play in the organization.

- Sit down and map out what you would like to do with each donor throughout the year and what that would look like. Maybe you will invite one person to a gala, and another to a program event depending on their expressed interests. Create a personalized outreach plan for each person.
- Be disciplined with your major donor list. It's important to recognize that not all who give are created equal. Not all donors want the same amount of attention.
- If you have older donors, find a heartfelt way to talk to them about legacy gifts such as bequests. This could be a way for people with fixed incomes who would like to be more generous, to ultimately provide significant support.

IV. “Welcome to our community”: Involve your board in donor stewardship

- The board members are role models as your donors' peers. They can say, “This is really important to me and I give a big chunk of my resources to this organization. I am hoping you will do the same.”
- When people ask a board member how their weekend was, they have a choice to say, “I went to a great restaurant” or “I spent time working with [Your Organization] and let me tell you how fabulous it was.” You need to help board members to consistently make the later choice.
- At events, give each board member two or three people to connect with. Assign staff to make the right introductions as those targeted guests arrive.
- If board members bring people to the organization themselves, be strategic. Sit down with each board member at the beginning of the year and talk about what the previous year looked like and what the next year will bring. Be specific – who they brought in, how much they gave, which events they attended. Create a plan, and reach out monthly to check in.
- Ask board members to make Thank You calls. Arm them with talking points and information about the donor.
- Board members are busy with their jobs and lives – make sure your organization keeps them focused on their to-do list with regular follow up.

V. “More than just one pretty face”: Expand donors' relationships from a single point of contact to others in the organization

- Be purposeful about building relationships between all major supporters and other board members or staff. Work on building those relationships.
- Have board members learn more about the organization and feel more connected by interacting with senior staff, not just the Executive Director.
- Team up staff and board members to meet with donors and foundations.
- You have to be careful, especially when you are the founder, to connect your contacts with others, so they don't leave when you do. Succession planning is very important.

VI. “Be a part of something bigger”: Make a compelling ask

- Donors like to be on winning team. The more you can tell the story of your organization's unique achievements, the better. Convince people their contribution could make your organization that much more successful.
- Stay positive. People want to help you get to your goal but they don't want to save a sinking ship.
- Prepare stories that touch the heart with emotion and the brain with demonstrated outcomes. Some donors will want both and some will want one or the other.
- Practice is key. If you have a Development Director, or peer, or a partner who is willing to practice with you, you can sit down before every ask and try out your pitch.
- If you are nervous asking for money, remember that you are not asking for money for yourself but for a cause you believe in. The more you live with that, the easier it gets.