Stewarding Deeper Donor Relationships

Jessica Fujimoto, Account Director
Karla Baldelli, VP of Donor Engagement
Your Presenters

Jessica Fujimoto
Account Director

“I am passionate about creating memorable experiences to connect the heart of your donor to the heart of your cause.”

Karla Baldelli
Vice President, Donor Engagement

“That who never change their minds, never change anything.”
-Winston Churchill
Today’s Discussion

• The gratitude dilemma

• Let’s talk about feelings

• Zero in on your audience

• Measure how it’s working

• Invest in relationships
The gratitude dilemma

The conventional “ask” and “volume” engine sooner or later hits massive, and unavoidable diminishing returns.

– Kevin Schulman, DonorVoice, January 2020
The gratitude dilemma

The #1 reason for retention decline

We do not take time to thank and steward our donors well.
The gratitude dilemma

Can you identify with any of these statements or questions?

- I want to steward my new COVID donors, but I’m not sure how to do it best
- I need to improve our donor retention
- Thank you 2020, but now, how do I KEEP our donor retention numbers from falling?
- How do I focus on long-term donor value?
- Are my donors loyal? How can I re-enforce brand loyalty?
- I don’t have time to do stewardship well
- I can’t invest in stewardship! How would I justify this expense with my board?
- I don’t know how to plan around audience behavior, I’m just trying to get them to give!
- I’m ready to improve our stewardship and engagement opportunities without overtaxing my team. Are there tools that can help me?
The gratitude dilemma

Show me the money, and I’ll show you some budget share???

Stewardship is often neglected from programs because organizations believe that with no direct revenue there is no way to track program success *(or is there...?)*

**Question**
How can we build programs and communications that help to retain our donors while driving higher lifetime values and long-term support?

**Answer**
By building stronger donor *relationships*.
Let’s talk about feelings

People will forget what you said, forget what you did, but people will never forget how you made them feel.

– Maya Angelou
Let’s talk about feelings

How do donors want you to make them feel?

• First step: Ask a donor
• Tactically, donors are looking for 3 things:
Let’s talk about feelings

Donors want to feel like they are getting an insider look into your organization

- What access are you giving to your donors?
- Does it change based on their giving level (regardless of channel)?
- What information can you offer that is exclusive to them?
- Building trust, confidence and excitement through access

Examples

Consider insider newsletters or emails, SNEAK PEAK into services and future vision casting, exclusive invitations, an exclusive message from your CEO or handwritten note from a DO on an acknowledgement receipt segmented by gift levels.

Access to What + to Whom
Let’s talk about *feelings*

How are you reporting back on a donor’s **impact** to your organization?

- Sharing information that is **timely**, **relevant**, and **meaningful**.
- Donors want to know what **impact their** gift has on the work you do.
- Proving to the donor that what they intended to happen through their gift actually happened.
- Donor focused. Because **YOU** gave, XX happened.
- Knowing they had an impact encourages the desire to return for that feeling again.

**Examples**

*Impact reports that tie to specific funds they gave to, intentional reporting back across all channels telling the ongoing story, email story journeys, postcard series to new donors, etc.*
Let’s talk about feelings

How can you use experiences to inspire your donors?

- Set your organization apart through the experiences you create for your donors. Events should be creative, thoughtful, and intentional all the way through.

- From the top down, everyone should feel as if they are invited into a unique, emotional experience with you, where they walk away inspired and ready to spread the word.

- Connect the dots of your vision and your mission, while remaining centered on the donor.

- Know the goal of what you are trying to accomplish for each experience.

Examples

Customized events for your major donor givers or lifetime givers, volunteer events with personalized t-shirts, virtual events with customized boxes sent ahead to your major donors, decorating your cars for food drop offs, the “Appy Hour”, etc.
$5.8 billion is lost through a lack of mid-level donor loyalty each year… The good news is, mid-level donors are looking for something relatively simple. Stewardship.

– Karla Baldelli, RKD Blog, March 2020
Zero in on your audience

Know your audience + focus your audience

- Who are your most valuable donors?  
  *(Hint: It might not be who you think!)*
- Who can you not afford to lose?
- Who has been giving the longest to your organization?
- Who has given the most to your organization?
- Who are your high value donors, and how are you stewarding them throughout the year?

Measure your donor’s relationship to your organization by focusing on:

**Retention + Long Term Value (LTV)**
Zero in on your audience

Prioritize your audiences as you prepare your stewardship action plans

Audiences to Consider

- New donors
- Recently lapsed donors (2-3 years)
- Sustainers
- Loyal donors
- Middle donors
- Major donors
- Board members
- Estate Planning + Planned givers
Zero in on your audience

Limit, prioritize, + maximize your focus on the right audiences

Focus on creating custom stewardship journeys for these audiences!

60
Mass Marketing
General Donors

20

20
Moves Management
Major Donors
Problem
Revenue loss due to a drop in retention. Compared to the national retention average (46%), JDRF was ranging between 26-28%.

Solution
Set three strategic priorities across the organization with a goal to increase retention to 46% in 5 years ($98M increase in 5 years):

- Universal stewardship – treat donors agnostic of channel with the same experiences based on giving levels
- Donor point of view – speak to donors in a way that is meaningful and personal
- Impact reporting – report back to donors on the impact of their gift showing that their gift was used the way they intended
- Appreciation + Value Added = Donor-centric

Case Study:
Focus on retention leads to BIG wins
Increase in retention leads to $98 Million increase in giving over 5 years
Case Study: Focus on retention leads to BIG wins

Increase in retention leads to $98 Million increase in giving over 5 years

Results + Takeaways

- Make your retention numbers real, so that others can feel the weight of urgency
  (even a 3% increase in retention meant $17M more each year for JDRF)
- Stay focused on your goals
- Set clear standards for donor engagement and stewardship,

With just a 3% increase in retention

$17M in year one

Hit national average of 46% retention

$98M in 5 years
Measure how it’s working

A 10% increase in donor retention can increase the lifetime value of a donor by up to 200%.

– Dr. Adrian Sargeant
Measure how it’s working

Two types of reports you need to implement *today*!

**Activity Report**
Manage your team

**Stewardship Report**
Inform your priorities
Measure how it’s working

Activity reports to help you manage your teams

• Not just for your major donor officers, but for all your donor and supporter programs

• **If you don’t have accountability, stewardship will fall by the wayside**

• It shouldn’t be complicated. Prioritize measuring actions or consistent execution. This is the only way to drive change.

• Discipline of habits that drive your behaviors will equal stronger performance.
Measure how it’s working

Stewardship report to measure + inform your priorities

• Monitor long-term donor value by audience
• Evaluate retention rates and monitor progress YOY
• Stewardship audience planning
• Consecutive donor views
• First-time donor views
• Individual donor identification

Stewardship Report
Inform your priorities
Invest in relationships

Invest in great relationships; they will pay a lifetime of dividends.

– Bill Walsh, Former San Francisco 49ers Head Coach
Invest in relationships

The three investments you need to make to develop strong donor relationships

Planning
Time to train your team + define your strategy

Tools
Technologies that will streamline your efforts

Org Culture
Attitude of gratitude that is centered around donor relationships, not transactions
**Invest in planning**

Invest your time in your team and creating strategic next steps to build donor relationships

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**Map the journey**

What does your donor’s experience look like? What opportunities are there for improvement?

**Set data driven goals**

Define your audience, outcomes, and set a baseline for success using your stewardship report metrics

**Prioritize your action steps**

Chart the steps your organization can take for improved retention and long-term donor value.

**Train your team**

Train your team to build relationships with your donors. Teach them to build programs that prioritize *access, information* and *experiences* for your donors across all programs and channels.
Invest in tools

Find the stewardship tools that fit your organization best

- **ThankView** – personalized, branded video email campaigns and text messages
- **ViewSpark** – real-time video updates through email and text messages
- **RKD Connect** *(powered by Nimble Connect)* – personalized thank you calls and handwritten cards
Invest in tools: ThankView

Build and deploy video messages with strategic support from the ThankView + RKD teams

Personalized, branded video email campaigns and text messages with the goal to:

- Engage donor/supporter audiences
- Steward donors
- Help drive events
- Raise awareness and funds
- Turn first time donors into life-time supporters

Includes campaigns that enhance the donor journey development focusing on:

- Donor thanks
- Appeals & solicitations
- Video request
- Event related
- Updates
- Birthdays
- Anniversaries
- Dynamic personalization

*Check out a this personalized ThankView video email!
Invest in tools: ThankView

ThankView + RKD Pricing

ThankView + RKD exclusive benefits for clients include special custom branding packages and text messaging services. All packages include:

- 1 branded portal
- Unlimited video storage
- 3 user licences
- Video overlays
- Video editing
- Reporting + donor metrics
- Scheduled automation
- Custom Email Address
- Custom Envelope
- Branded landing page

**ThankView Basic: $6,000**

*Plus one-time $1,000 onboarding fee*

- Up to 10,000 records
- **Bonus:** Custom Branding Package ($750 value), includes additional branded landing page (2 total with 3 updates each per year), additional custom envelopes, custom video overlay(s), and custom music

**ThankView Premium: $10,000**

*Plus one-time $1,000 onboarding fee*

- Up to 30,000 records
- **Bonus:** Custom Branding Package ($750 value)
- **Bonus:** Text Messaging Package ($1,500 value), includes ability to send as a text message plus a custom phone number

*Reach out to your RKD strategist for a personalized quote for your organization.*
Case Study: ThankView

Arizona Gives Day stewardship email highlights impact and engages with key donors

**Problem**
Create a high volume of personalized stewardship touchpoints to increase engagement and report on impact to Arizona Gives Day donors.

**Solution**
Personalized ThankView video email campaign with options for donors to send video email responses.

- Avg view percentage: 81.2%
- Open rate: 62.4%
- Video downloads: 18
- Video replies: 9
- Facebook shares: 21
Invest in tools: ViewSpark

Real-time video updates to engage with your donors

• “Just in Time” Video Updates
• Up to 15,000 records in ViewSpark
• Client builds and deploys video messages real time with consultative support from client service team
• Reporting built into platform and can be delivered independently or as part of aggregated reporting
• Donor metrics can be exported and combined for omnichannel analytical views
• Audiences include:
  • Mass audiences
  • Monthly sustainers
  • Volunteers
  • Middle/major donors
  • Welcome campaigns
  • Emergency communications
  • Internal communications
Invest in tools: ViewSpark

ViewSpark + RKD Pricing

**Pricing**

*Package includes: 4 user licenses with one sending account, 2-way text messaging on unique 800 number, custom email template, 1 custom keyword/short code combination.*

**$399 Monthly** ($4,788 annually)

- Up to 15,000 records (more available at additional fee)
- Text message rates apply
- $25 service fee if not integrated to ViewSpark giving platform

*Reach out to your RKD strategist for a personalized quote for your organization.*
Invest in tools: RKD Connect

Personalized thank you calls and handwritten cards to your donors

Weekly Live Donor Ambassador Calls

*Live thank you calls and voice broadcast services immediately following donors’ gifts.*

Includes:

- 90-day merge/purge to avoid over-calling
- Donor phone number append
- Weekly comment reporting
- Monthly calling detail reports
- For faith-based organizations: Donor Ambassadors love to talk and pray with donors (include weekly prayer reports)
- Bonus: 10,000 minutes of voice broadcast/year ($550 value)

Handwritten New Donor + Gap Touch Thank You Cards

*Personalized, handwritten cards to mid-to-upper tier donors ($500+). Available gap touch card to donors ($100+) who where not able to be contacted via phone.*

Includes:

- Live pen for handwritten font
- Custom designed 4x6 folded cards (4-color front and back)
- Fully handwritten card (up to 300 characters + signature) and handwritten envelope
- First-class postage mailed from local zip code (shipping additional)
- Bonus: Client personalized handwritten font ($500 value)

*Reach out to your RKD strategist for a personalized quote for your organization.*
Case Study: RKD Connect

Moving the needle with donors with engaging thank you calls and handwritten thank you cards

Problem
With large influx of gifts and new donors, City Rescue Mission needed to find a way to thank donors and invite them into the organization without taxing existing staff resources.

Solution
Outsourced thank you calls and handwritten cards through RKD Connect to ensure that every donor at year-end felt welcomed, thanked and affirmed.

Results + Takeaways

Part One

- Positive donor experience with the calls
- Warmer assigned DO calls following thank you call campaigns
- Opportunity for follow-up action items with key donors
- Freed up staff to focus on major donor calls

6,833 connected calls $0.01-$249.99
3,371 handwritten cards
New donors: $0.01+
Gap touch: $100-249.99

Verdean D.

“Barbara was very grateful for The call. She says she is always giving and no one says thank you. She says she appreciates being appreciated.”

Barbara J.

“Verdean was grateful for the call. She says she loves getting the reports about people who have been helped by city rescue mission. She is happy to help out and wished she could do more.”

Verdean D.

“Sharon was grateful for the call. She was happy to know her gift is helping out someone in need.”

Sharon B.
Case Study: RKD Connect

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Results + Takeaways

Part Two

Handwritten note sent to CEO after receiving an RKD Connect handwritten thank you cards.

Lorie C
A few weeks ago one your wonderful volunteers called to thank me for supporting CRM. She then asked if I needed prayer. I was so touched and impressed that she didn't ask for anything. I also received a packet of flower seeds as token of appreciation and reminder of God's beauty. You don't know how much that prayer meant to me.

Like · Reply · Message · 15h
# Invest in tools

## How to use these tools within your communication plans

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<td>1-3 Jan</td>
<td>1-7 Feb</td>
<td>25-Feb</td>
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<td>8-14 Feb</td>
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<td><strong>Week 5</strong></td>
<td>25-3 Jan</td>
<td>29-Feb</td>
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### Stewardship

- **Stewardship Mail**: 
  - January: STWD New Donor Postcard 012123
  - February: STWD New Donor Postcard 022123
  - March: STWD New Donor Postcard 032123
  - April: STWD Postcard 042123
- **In-home date**: 3/21, 4/28, 5/15
- **ThankView Emails/Tweets**: 
  - January: STWD New Donor Postcard 012123
  - February: STWD New Donor Postcard 022123
  - March: STWD New Donor Postcard 032123
  - April: STWD Postcard 042123
- **Audience**: 
  - January: All new donors from TechPALS/Christmas/Year-End Campaign
  - February: 0-6mo/7-12mo/13-month active donors
  - March: All donors to the Fundraising "Challenge" Report Back
  - April: Hearts of Hope Initiative from Women's Group
- **In-home date**: 
  - January: 3/21, 4/28, 5/15
  - February: STWD New Donor Postcard 022123
  - March: STWD New Donor Postcard 032123
  - April: STWD Postcard 042123

### Thank You Phone Calls (powered by RVD Connect)

- **In-home date**: 3/21, 4/28, 5/15

### Thank You Hand Written Cards (powered by RVD Connect)

- **In-home date**: 3/21, 4/28, 5/15

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**35**
Invest in org culture

Foster an attitude of gratitude in your organization from the top down

• Did you become a fundraiser because you wanted to ask for money, or because you found a cause you were passionate about and wanted to share your excitement?
• Changing the mindset in your organization is a shift to becoming donor centric.
• Not how you do it, its THAT you do it.

A donor centric approach is a daily balance between

stewardship → cultivation → compelling offers
What’s next?

Baby steps.

– Bill Murray, *What About Bob?*
What’s next?

Set actionable next “baby steps” for improving your relationships with your donors

• **Zero in on your audience**: Who is most valuable and who can you not afford to lose?

• **Measure how it’s working**: Improve accountability across your teams and your work through Activity Reports + Stewardship Reports

• **Invest in relationships**: Planning, tools, and org culture

• **Need help planning your first “baby steps”?** Reach out to your RKD account team for a list of our available stewardship services, tools and audit + action plans.
Q&A
Thank you!