

Meals On Wheels

LEADERSHIP ACADEMY

Welcome to "Stewardship that Inspires Happy, Loyal Donors"

Presenters: Vanessa Chase

Facilitator: Magda Hageman-Apol

The webinar will begin at 3:30 p.m. Eastern Standard Time

Meals On Wheels

LEADERSHIP ACADEMY

Webinar Tips

We recommend that you listen to the webinar over your computer speakers.

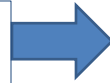
Your microphone or telephone will muted but you can ask questions throughout the webinar, as shown on the next slide.

**Please feel free to ask your questions
by using the Questions box on the Control Panel**

This orange button on the upper right of your screen shows or hides the control panel.



Type your questions and comments here and press send.



Stewardship that Inspires Happy,
Loyal Donors

Presented by Vanessa Chase

My Story



Vanessa Chase

Fundraising and Communications Strategist
Co-Founder of Stewardship School

Has raised \$10 million and counting

Speaker: Association of Fundraising Professionals, Association of Donor Relations Professionals, Council for Advancement and Support of Education, Net Squared and BBCON

Clients: A Rocha Canada, Wagner Hills Farm Society, Hope for the Nations, Union Gospel Mission, Cancer Care Connection, BC Children's Hospital Foundation

Discussion



Introduce yourself!

What are you most looking forward to learning during today's webinar?

Donor Retention

The sector average for donor retention is 41% and the average for donor attrition is 59%






WHY **VS.** HOW



FINDING SOLUTIONS



-  *Demonstrates impact + accountability*
-  *Practice of gratitude*
-  *Shows donors that you care*

WAVAW

*2010 – 2011 Fiscal Year
Revenue \$41,000*

*2013 – 2014 Fiscal Year
Revenue \$181,000*

How?
*Monthly thank-a-thons
Handwritten notes
More touch points without an ask*

They focused on taking care of their donors!

**Donor Stewardship
Plan**

Donor Stewardship

- 🕒 *Get to know your donors*
- 🕒 *Review your stewardship efforts*
- 🕒 *Put your donors first*
- 🕒 *Surprise and delight*
- 🕒 *The final plan*

Get to know your donors

Who are your donors?



Discussion



Have you ever surveyed your donors?

Get to know your donors

Start with an annual survey



Get to know your donors

Aim for a mix of 5 to 10 questions

Qualitative + quantitative questions



Get to know your donors

Of the programs and services your gifts help support, what are the most important ones to you? Which are expressed in the most compelling way?

To what degree do you feel your gifts of (time and money) to us have made a difference (to the people you serve) (to the community you serve) (in achieving our mission)?

To what extent does our mission (vision, work) reflect your personal beliefs?

On a scale of one to five with five being very satisfied and one being not at all satisfied, how would you rank your level of satisfaction with your giving to our organization?

Is there anything that would increase your level of satisfaction as a donor to our organization?

What age range are you?

What is your household income?

Get to know your donors

Create a donor profile



Review

Calculate your retention rate



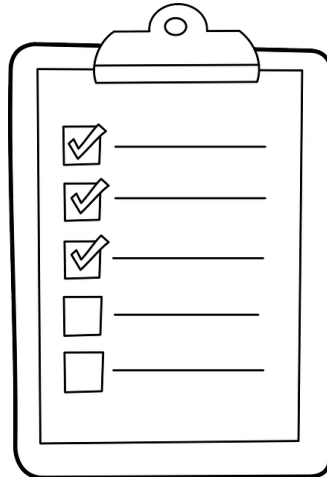
Step #1 Get a list of all the donors who gave in 2013.
Step #2 Of those donors, find out who made a gift in 2014.

$(\text{Step \#2}/\text{Step \#1}) \times 100 = \text{your 2013 retention rate}$

Review

Over the last 6 to 12 months, what have you sent your donors?

Make a list.



Review

Some common stewardship activities:

- *Thank you letter*
- *Thank you phone call*
- *Stewardship report*
- *Annual report*
- *Donor newsletter*
- *Thank you email*
- *Volunteer opportunity*
- *Face-to-face meeting*

Quick Review

#1 – We have a greater understanding of who our donors are

#2 – We have a few benchmarks to work and measure from

Putting Donors First

Are you putting your donors first?



“Donors don’t give because you’re great. They give because they’re great.” - Jeff Brooks

Putting Donors First

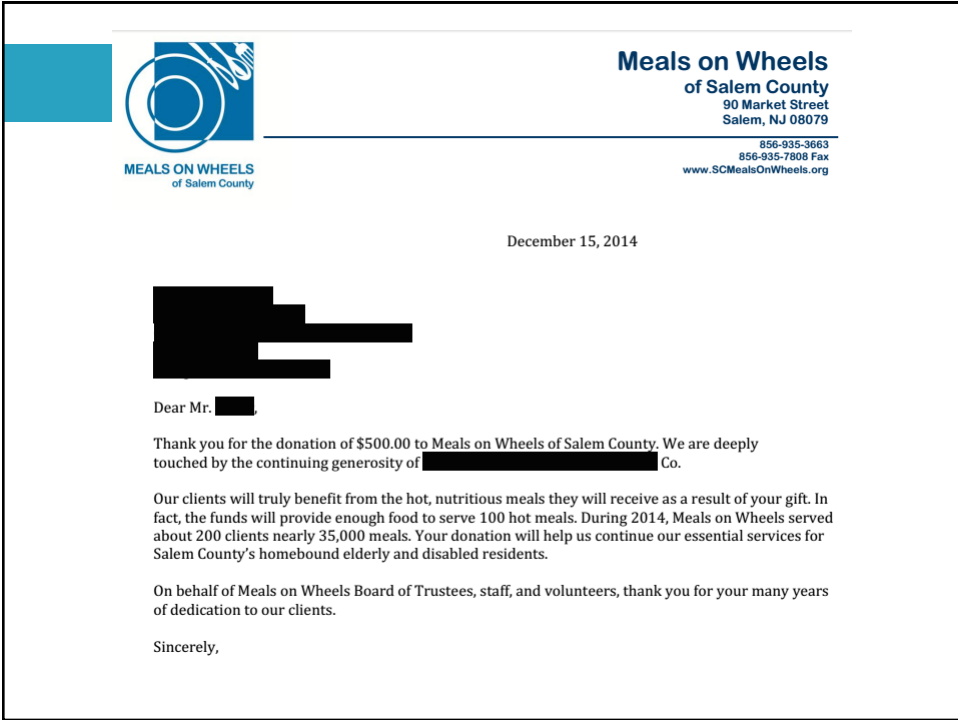
Self-Assessment

1. Are you tracking your donors' communications and solicitation preferences in your database?
2. Are you acknowledging gifts within 2 to 3 days?
3. Does your acknowledgement letter talk about the gifts impact and the specifics of what that means?
4. Do you use "you" more than "we" in your stewardship materials?
5. Do you survey donors to find out their satisfaction levels?

Discussion



Are you putting your donors first?





January 27, 2015

«fname» «lname»
 «secln»
 «add»
 «city», «st» «zip»

Dear «sal»:

Thank you for your gift of \$«amt» to the Tri-County Office on Aging, you are a Champion for Independence. Your tax-deductible gift will be used to help older adults in Clinton, Eaton and Ingham Counties stay in their own homes with the help of home and community-based programs like Project Choices, Meals on Wheels and other in home services.

TCOA also has many programs and services to assist older adults, such as the Medicare/Medicaid Assistance Program, housing assistance and dining sites across the tri-county area where seniors can gather to share a meal. In addition, the Tri-County Office on Aging provides in home services like homemaker services, personal care assistance and respite care relief for full-time caregivers.

Staff can answer questions about services available to seniors in the community. This information can also be found on our web site, www.tcoa.org or by finding us on Facebook.

For 40 years, the Tri-County Office on Aging has worked to provide cost effective and compassionate care for the most vulnerable residents of our community. There are so many worthwhile charitable causes, we thank you for your support of area seniors.

With Warm Regards,

Putting Donors First

Donor-Centered Thank You Letter

Use a creative opening sentence. Not "On behalf of. . ."

Give a specific example of how the donation will be used.

Include a picture or two of the work in action.

Personalize the letter - donor's name, gift amount, why they gave.

Send it out promptly.

June 27, 2013

Name
Address
City, State Zip

Hi, Name!

Imagine you're out for a hike, bike or ride, enjoying the amazing natural beauty Truckee Meadows has to offer. The afternoon sun shines brightly through the shotgun holes in an old television. A river of plastic chemical bottles snakes away along a ravine. A lump just barely hanging on to its identity as a recliner belches pieces of foam into the wind.

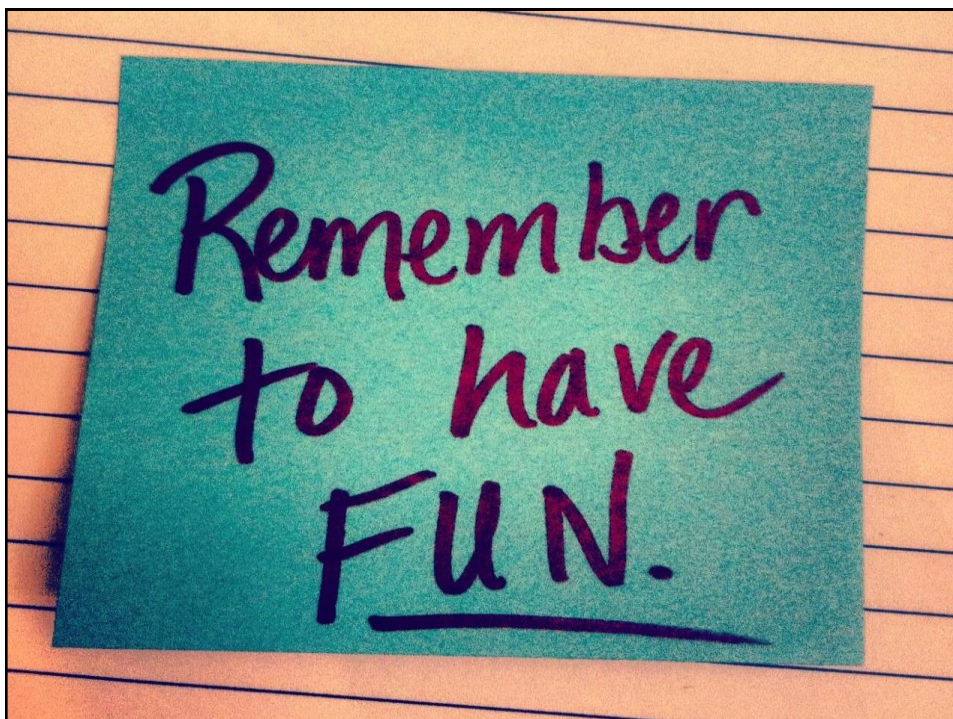
Thanks to you, these scenes are disappearing. And after KTMB's Great Cleanup on May 11, the photos at left, ceased to exist. That's the kind of result you can expect when you support Keep Truckee Meadows Beautiful through programs like Nevada's Big Give. You make our home cleaner and safer for everyone, and we can't thank you enough.

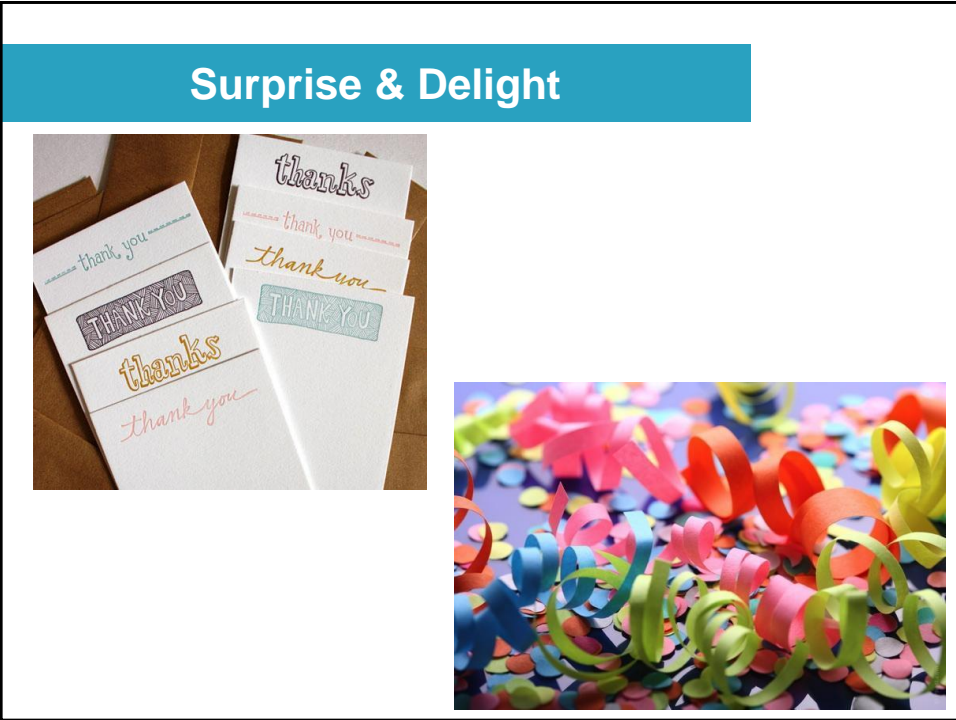
We rely on all our members, Beautiful Businesses and volunteers so much, which is why your donation of \$24.28 on 4/25/2013 is so appreciated. Not only does your support help us buy supplies and dumpsters for the Great Cleanup, it helps with river and neighborhood cleanups, childhood education and so much more.

Please get in touch with me if you have any questions about our programs or KTMB in general. And please feel free to pass on my information if you should hear any questions from your friends or neighbors you think I could answer.

Thank you again for your generosity and support!

Christi Cakiroglu
Executive Director
Keep Truckee Meadows Beautiful
775.851.5185
staff@ktmb.org



Discussion



What's one thing you can do to add a little surprise and delight to your donor stewardship?

The Final Plan

6 to 18 month plan that tells you exactly how to take care of your donors.



The Final Plan

Gift Level	Thank You Letter	Thank You Phone Call	Stewardship Report	Holiday Card

The Final Plan

Gift Level	Thank You Letter	Thank You Phone Call	Holiday Card	Stewardship Report
\$1 to \$99	Yes within 3 days	Yes within 7 days		
\$100 to \$250	Yes within 3 days	Yes within 7 days		
\$251 to \$500	Yes within 3 days	Yes within 7 days	Yes	
\$501 to \$2,000	Yes within 3 days	Yes within 7 days	Yes	Yes 3 months after gift

The Final Plan

Need to build capacity? Use your board and volunteers!



How else can these principles be used?

Stewarding Event Donors



OCT 26 **NOURISH** 20 13

MEALS ON WHEELS CHICAGO * 2013 CELEBRITY CHEF BALL

The Final Plan

Goal: to cultivate event donors to become regular donors

Stewardship Actions:	Hand written thank you note	Thank you phone call	Photo postcard	Invite for a volunteer shift
Donor Segments:	All	Donors who gave over \$500	All	Donors who gave over \$500

What We've Learned

#1 – We must know who are donors are

#2 – We must create some benchmarks for ourselves

#3 – It's important to know how donor-centric we are

#4 – Stewardship can be fun!

#5 – Create a stewardship plan

Questions?



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 [storytellingnp/](https://www.pinterest.com/storytellingnp/)

Meals On Wheels

LEADERSHIP ACADEMY

Stewarding Donors with Stories

Presenter: Vanessa Chase
 When: February 5, 2015
 Time: 3:30 PM to 4:30 PM EST
 Fee: \$25
 Competency: Relationship Building
 Track: Development and Fundraising
 Level: Advanced

Making Informed Decisions to Build Capacity and Sustainability in Your Program

When: February 12, 2015 at 3:30 PM EST
 Time: 3:30 PM to 4:30 PM EST
 Fee: \$25
 Competency: Food Service Knowledge
 Track: Nutrition

Getting Your Volunteers Out of the Box

When: February 19, 2015
 Time: 3:30 PM to 4:30 PM EST
 Fee: \$25
 Competency: Organizational Planning
 Track: Volunteer Management