


THE POWER OF DONOR RELATIONS
 Practicing Professionalism and Being Ethical

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Trust.
noun

1a. assured reliance on the character, ability, strength or truth of someone or something.

1b. one in which confidence is placed.



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Trust.

“Everything of value is built on trust, from financial systems to relationships.”

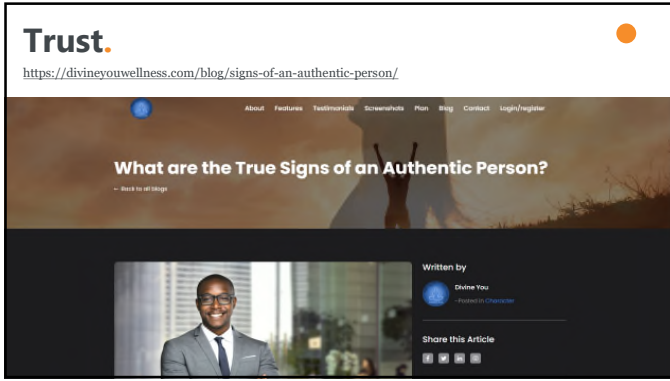
David Horsager
The Trust Edge

“Trust is the confident belief in someone or something. It is the confident belief in an entity:

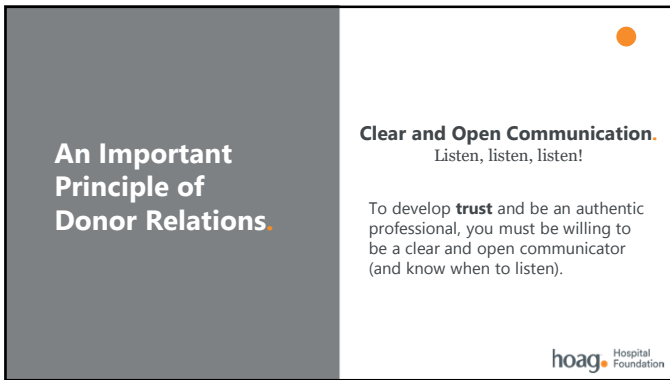
- To do what is right
- To deliver what is promised
- To be the same every time, whatever the circumstances.”



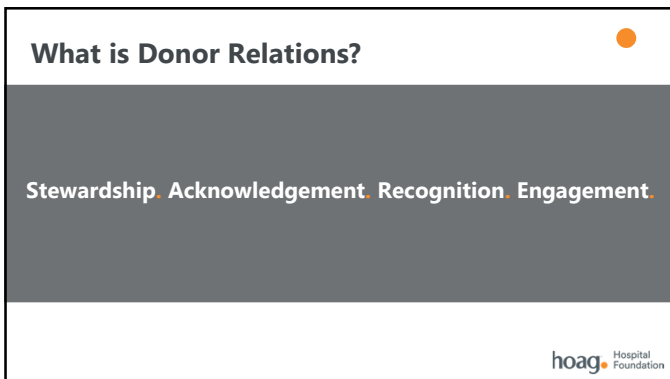
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DONOR RELATIONS

Stewardship.

- Inform donors of usage and investment of their philanthropic giving
- Pertains to the gift that the donor has entrusted to organization
- Accountability and transparency
- **It's the right thing to do AND inextricable for the philanthropic process**



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DONOR RELATIONS

Acknowledgement.


Receipts.

Gift Agreements.

Acknowledgements.

Leadership Appreciation Processes.


At some organizations, donor relations has no responsibility for receipts and gift agreements because these are required by tax law, GAAP, or both. However, at minimum, leadership acknowledgments or organization-wide thank you letters are always included.




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DONOR RELATIONS


Recognition.



Public



Private



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DONOR RELATIONS

Engagement.

1

Access.
Insider Connections

2

Information.
Insider Knowledge

3

Experiences.
Tours
Releasing animal back into wild
Working in a soup kitchen
Participating in something otherwise not attainable

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?

What's Next?

The donor is in the door...
How do we keep them?

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DONOR RETENTION

Keeping Relationships Professional and Ethical.

Ethical.

- Conforming to accepted standards of conduct.

What is appropriate?

- Unrealistic Expectations
- Gifts
- Meals
- Out of town stays

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DONOR RETENTION

AFP | Fundraising Effective Project

Donor Retention Rate
 2020 | 43.6%
 2014-2019 | 43.6 – 247.2%

In 2018, for every 100 donors gained,
 105 were lost through attrition.




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DONOR RETENTION

5 CHALLENGES

- 1. Donor Dissatisfaction.**
36% of lapsed donors leave because they thought other organizations were more deserving of their contribution.
- 2. Limited Time for Personal Interactions.**
9% of lapsed donors left because the organization didn't leave a lasting impression on them.
- 3. Donors are Treated like ATMs.**
54% of lapsed donors did so because they could no longer afford to contribute.
- 4. Lack of Prioritization of Retention.**
The average donor retention rate after the first gift is 19%, while it's 63% after the second donation.
- 5. Limited Technology.**
18% of lapsed donors did so due to poor communication strategies.



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DONOR RETENTION

1. Donor Dissatisfaction.
36% of lapsed donors leave because they thought other organizations were more deserving of their contribution.

This concept can be boiled down to a single word:

Impact.



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DONOR RETENTION

2. Limited Time for Personal Interactions.
 9% of lapsed donors left because the organization didn't leave a lasting impression on them.

Personalizing your communications with supporters shows that your organization **wants** to develop a relationship with them.

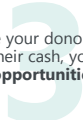




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DONOR RETENTION

3. Donors are Treated like ATMs.
 54% of lapsed donors did so because they could no longer afford to contribute.

In order to make sure your donors don't feel like you're simply using them for their cash, you should approach them with a **variety of opportunities** for engagement.






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DONOR RETENTION

4. Lack of Prioritization of Retention.
 The average donor retention rate after the first gift is 19%, while it's 63% after the second donation.

The key to nonprofit growth is striking a balance between your **donor retention** and **donor acquisition strategies**.





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DONOR RETENTION

5. Limited Technology.
18% of lapsed donors did so due to poor communication strategies.

Before investing in a software solution where the price seems too good to be true, make sure you **conduct your research** to make sure you'll have access to everything you need.



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DONOR RETENTION

10 Ways to Maintain Relationships.

1 Show Appreciation 2 Respond quickly to inquiries 3 Report Results 4 Thank in Creative Ways 5 Share Success Stories




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DONOR RETENTION

10 Ways to Maintain Relationships.

6 Keep them up-to-date 7 Invite them to proffer feedback 8 Share before & after stories 9 Personalized Thank You Letters 10 Celebrate Successes

- Volunteers
- Hospital Leadership
- Physician Partners
- Grateful Patients



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Case Studies.



Sally
Difficult



Laurie
Dinner
& a Movie



Guy
Weekly
Dinners & Gifts




Philomena
Trips

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Case Study. Too Difficult.


- 50
- Complaining in ED
- Yelling at Staff
- \$1,000,000 donor
- \$10,000,000 donor
- \$100,000,000 donor



Sally

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Laurie

Case Study.
Dinner AND a Movie.


- Bad Marriage
- Likes Movies
- Husband doesn't
- Go or Stay?

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Case Study.
Weekly Dinner and Gifts.


- Single
- Wealthy
- Lonely
- Every Monday
- Gifts from Annual Gala



Guy




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Philomena

Case Study. Trips.

- Wealthy donor
- Close relationship
- Birthday out of town
 - Overnight
 - SWAG
- Overseas trip
 - Private plane
 - Private Island




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Questions?

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PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: _____ Speaker: _____

Name (optional): _____

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					

II. RELEVANCE	5	4	3	2	1
Was the subject matter directly related to the requirements of your job?					
Comments: _____					

III. VALUE	5	4	3	2	1
Do you believe the benefits of this session were worth the time, effort and cost?					
Comments: _____					

IV. SPEAKER	5	4	3	2	1
How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?					
Comments: _____					

V. MATERIALS	5	4	3	2	1
Were the materials clear and organized and appropriately helpful for the session?					
Comments: _____					

Vi. What did you like the most about the session?

VI. Any suggestions to improve future sessions?

XII. How many years of gift planning experience do you have? _____