Spectacular Donor Stewardship

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#bridgeconf
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Today’s Discussion

- Introduction
- Case Study: PCRM
- Stewardship Toolbox
- Q&A
It’s Tough Out There...

- Many organizations are competing for your donors’ attention.
- According to Target Analytics, 67% of donors give to 6+ charities. The average is 13 organizations!
- In this economy, you can’t afford to lose the donors you worked so hard to acquire.
- Exceptional donor stewardship is more critical than ever before.
Individual Donors are Key

Individuals Contributed $290.89 Billion to Charities in 2010!

- Individuals: 73%
- Corporations: 14%
- Foundations: 5%
- Bequests: 8%

Figures from Giving USA 2011 (06/2011)
Donations From Individuals
Increased Only Slightly in 2011

- According to *Giving USA*, individual contributions increased by just 0.9% in 2011.
- Federal, state, and local governments cutting back.
- Foundation and corporate giving down.
- Bequests were up – but are hard to control.
- Individual giving was stagnant.
To Get Major and Planned Gifts, Need to Build Up the Donor Pyramid

Engage new donors right away to ensure second gift

90% of revenue from 10% of donors

Cultivate and upgrade multi-year donors
How Do You Stay at the Top of Your Donors’ Charity List?

- Help donors feel excited about supporting you.
- Thank them quickly, and meaningfully.
- Show them how they made a difference!
- Help them to get to know you better.
- Listen to them.
- Thank them unexpectedly – show them how much you appreciate them.
- Make them feel special.
PCRM: A Case Study in Making Donors Happy
Physicians Committee for Responsible Medicine (PCRM)

Founded in 1985, the Physicians Committee for Responsible Medicine (PCRM) is a nonprofit organization that promotes preventive medicine, conducts clinical research, and encourages higher standards for ethics and effectiveness in research.
PCRM Development Program

- 150,000 active donors.
- Multi-channel campaign includes direct mail, online marketing, telemarketing, events, personal solicitation, planned giving.
- Program raises $11 million annually.
- President Neal Barnard, MD is well-loved by donors.
Guardian Circle ($1,000+)

- 2005: 164 donors, 433 gifts
- 2011: 296 donors, 657 gifts
Prompt Acknowledgment of a Large Gift

- We call right away!

- “I JUST learned of your generous gift and wanted to call right away to thank you and tell you how much it means to PCRM’s work!”
Assignment of a Personal Contact

- Business card of major gift officer is included with acknowledgment.
President’s Quarterly Update
Conference Calls

- Invitations by email with phone follow-ups.
- Call is hosted, so callers “check in.”
- For donors who expressed interest, MGO follows up with link to recorded call.
- Strict 30 minute limit – respects busy schedules.
VIP Mailing

- Quarterly mailing
- Written from Neal’s desk
- Includes “insider” information
Time with Neal

- Invitations to meet one-on-one with Neal before his public appearances
Neal’s New Books

- Signed copies offered for sale to donors.
- Personal touch – MGO offers to get book inscription personalized for donor.
Native American Nutrition Study

- Couple funded study from their family foundation.
- Nurse practitioner managing the program sent the couple a handwritten thank you note, along with small gifts from the reservation.
- Gifts were not lavish (bracelet) and became conversation piece for the wife, who loved to tell the story behind it.
Personal Touches are Working!

- Guardian Circle membership has increased 80% in the past 6 years.
- Revenue from the Guardian Circle has increased 91%.
- Average Guardian Circle gift has increased by 22%. ($2,700 / $3,300)
Spectacular Stewardship at all Levels!
Quarterly Report from the Field

Report from the Field
PHYSICIANS COMMITTEE FOR RESPONSIBLE MEDICINE / SUMMER 2011

It’s Time for Honest and Meaningful Dietary Guidelines

Earlier this year, the USDA released its latest Dietary Guidelines for Americans. Upon first review, these Guidelines are a step forward from those in years past, including important details on vegetarian and vegan diets that PCRM has been calling for. However, the Guidelines fall woefully short in cautioning people about the proven health risks of eating meat and dairy.

It seems the USDA would prefer to pander to agribusiness than to give consumers the honest information they need. The Guidelines continue to whitewash the harm that eating meat and dairy can do, resorting to terms like “cholesterol,” “saturated fat,” and “total fat” that mean very little to the general public that the Guidelines are supposed to inform.

To protect the health of humans and save the lives of billions of animals in the process, PCRM filed suit against the USDA on February 15 of this year demanding that the Guidelines be rewritten to become meaningful to the public.

The USDA also recently introduced its new “MyPlate” graphic to replace its vague and confusing Food Pyramid. Similar to the Guidelines, “MyPlate” takes a step forward, closely resembling the PCRM Power Plate, which we unveiled last year. Unfortunately, once again, the government’s version caters to agribusiness by adding a dairy group and replacing the healthy “Legumes” portion of the PCRM Power Plate with an ambiguously named “Protein” group.

People’s health and billions of animals’ lives are too important to take a backseat to food industry profits. We need government to stand behind nutrition policies that best serve the health of consumers, and the well-being of animals.

PCRM is making progress and building momentum toward a day when fewer animals are eaten, and more people live healthfully. This is a growing area of our work through which we hope to improve and save many lives. And, I’m so glad you are a part of it!

Go to www.PCRM.org/take-action — ask the USDA to revise the Dietary Guidelines for the health of people and the well-being of animals!

Neal D. Barnard, M.D.
President

5100 Wisconsin Ave., N.W. • Washington, DC 20016-4131 • www.PCRM.org • 202-686-2210
Monthly Online Newsletter

- Reach thousands with program updates
- Timely
- Provides an opportunity for feedback
A Special Touch at Events: Ribbons on Name Badges
Behind the Scenes: How to Prioritize Your Time

- One of the biggest questions facing development staff today – how do you decide what is the best use of your time?
Make a List of Your Stewardship Activities

- Which things are enhancing your relationships with donors?
- How much staff time does it take?
- Are the results measurable?
Brainstorm for New Ways to Make Your Donors Feel Special!

- Can you offer:
  - Facility tours
  - Special educational sessions with an expert on your staff
  - Brown bag program updates
  - Reserved parking
  - Some behind the scenes activity that is unique to your mission and not available to the general public?
Survey Your Donors! Just Ask Them:

- Do they feel informed?
- Do they know your mission?
- Do they know your CEO or President?

The answers might drive you to develop some spectacular donor stewardship activities of your own!
Results Are In!

- Annual revenue per donor is up – from $46.12 in 2008 to $57.78 in 2010.
- Multi-year donor retention improved – from 53% in 2008 to 57% in 2010.
- Among multi-year donors, the number of gifts per donor each year increased dramatically – from 1.56 gifts per donor in 2008 to 2.61 in 2010!
Stewardship Toolbox
Review Your Acknowledgments

- Are they fast? 48 hours is ideal, but a week is acceptable.
- Do they reference what the donor gave to?
- Do they focus on the donor making a difference?
- Are they warm and emotional in tone?
- Copy should avoid an institutional feel – write one person to one person.
New Donor Welcome Package

Dear Friend of Mercy Corps,

Welcome to the Mercy Corps family! I can’t thank you enough for your recent gift of $X, which is already helping us deliver immediate aid and long-term support to people struggling in the world’s most impoverished communities. I know you have donated a gift of $X, and I would like to help even more! Here’s my additional contribution to help Mercy Corps bring emergency relief and long-term support to the world’s most impoverished communities.

The Mercy Corps Pledge

I would like to help even more! Here’s my additional contribution to help Mercy Corps bring emergency relief and long-term support to the world’s most impoverished communities.

Jane Q Sample
Company ABC
1730 Rhode Island Ave NW
Washington, DC 20006

Welcome!

Rushing Food to Hungry Families in Niger

In July we reported that a hunger crisis was looming in Niger. Since then, the situation has worsened and millions of children and families are in need of assistance. In fact, this is the worst hunger crisis in Niger’s history. Half of the population is at severe risk of starvation, and thousands of children are already malnourished.

Last year the rains didn’t fall, resulting in months of extreme drought this year. Corps is now delivering more than 60,000 tons of food, beans, and cooking oil to more than 80,000 families in the Diffa region.

We’re rushing emergency food rations to suffering children and families. We’re delivering more than 60,000 tons of food, beans, and cooking oil to more than 80,000 families in the Diffa region.

Mercy Corps will stay in Niger helping children and parents for the long term.

Even with these emergency programs in place, families in Niger will have a long road ahead. But with the help of compassionate supporters like you, Mercy Corps will stay in Niger helping children and parents for the long term.

We’ll support farmers so they can rebuild from years of uncertain harvests and learn better methods to feed drought-prone villages. And we’ll work with mothers so they understand how to prevent childhood malnutrition.

It pains all of us to see families go hungry — and that’s why we are rushing to the side of thousands in Niger during the worst food crisis in years.

While we rush aid to Niger, others around the world still need our support. Read about our response to the floods in Pakistan inside.

www.lautmandc.com
Cultivate Your Donors by Mail

- Version appeals for special donor segments.
- Tailor a regular appeal to exclude the ask to create a nice cultivation touchpoint.
- Use internal documents to create “insider” mailings to bring donors closer.
- Create a simple newsletter to keep donors abreast of your work.
- Use acknowledgments to promote other ways to give.
- Annual cultivation postcard to all donor levels is a nice touch!
Develop a Communications Calendar

- Include all touchpoints throughout the year:
  - Mailed newsletters and appeals
  - E-newsletters and appeals
  - Event invitations
  - Telemarketing

- Use consistent messaging across channels
from the desk of  
Dan O'Neill

February 9, 2009

Dear Jane,

You have probably been hearing a lot these days about the “global credit crunch.” And frankly, it is hard for most of us to fathom loans in the hundreds of millions— or billions— of dollars.

Yet at the opposite end of the spectrum, Mercy Corps is making it easy to understand how very small loans, for $250 or even just $25, can mean a world of difference... thanks to your extraordinary generosity!
Cultivation
Postcard to
thank donors at
all levels

Thank you for helping millions help themselves.
Memo

Date: March 2010

To: Marine Corps Heritage Foundation Campaign Members

From: Lieutenant General Ron Christmas, USMC (Ret)
President and Chief Executive Officer
Marine Corps Heritage Foundation

Re: Quarterly Update

Dear Campaign Member:

I am proud to share with you that the Marine Corps Heritage Foundation finished 2009 on sure footing despite a difficult economy. It is thanks to the stalwart support of committed, patriotic Americans like you that we have started 2010 well positioned to continue our mission in the past, present and future.

Because you are a loyal Campaign Member, here are a few goals for the year ahead:

• In 2009, we made great progress in expanding our National Museum. These new Corps – from its founding in 1775 – became the elite fighting force able to participate in an exciting Marine Corps charging across the world.

• On February 19, we marked the beginning of the many years of hosting the Korean War veterans and the Marine Corps. In attendance were the Jones and several members of Marine Corps

(over, please)
Donor Cultivation Newsletter

von Briesen Challenge Reaches 100K Goal

The AFS-USA-von Briesen Family Challenge successfully reached its goal of raising $50,000, making it possible for the organization to offer $100,000 in additional scholarships to students who study abroad through the AFS-Faces of America (FOA) Diversity Scholarship Program.

Through FOA, AFS-USA partners with community-based organizations to identify their "best and brightest" students who are participating in leadership, education, mentoring programs, and award them with scholarships abroad—an experience they would otherwise not be able to afford.

In 1990, Theodore (Ted) von Briesen studied abroad for a semester in Germany. His experience had such an impact on him that 30 years later, he celebrated his AFS anniversary by establishing a $50,000 challenge grant for deserving students to benefit from the same experience.

More than 250 generous individuals took part in the challenge, which did not stop there, however. He is now reaching out to AFS Exchange Class of 1961 to help them establish the challenge grant for AFS Faces of America.

AFSers in the News

Recently, Pakistani student Faisal Sher Marri shared his experience on the website ThinksKipJourmalism.

"This was the first time I observed how much Americans love their country. It gave me a very positive impression of Americans. There are great cultural differences between Pakistan and America, but I’ve seen a lot of similarities. Our moral values are the same. We respect elders, our neighbors, helping those in poverty, working toward economic development and charity.

I just wish we could exclude the word “different” when it comes to such issues. I believe that all nations have the same values: love, humanity, and education. And based on my own experience, studying abroad would be a great way to see how we’ve not so different from each other.

Faisal, a Kennedy-Lugar YES exchange student from Pakistan, was hosted in Minnesota for the 2010-11 school year.

AFS-USA Global Connections


Assistant Secretary of State for Educational and Cultural Affairs says AFS Volunteers are “vital”

“You are the public face of America,” said Ann Stock to AFS-USA attendees.

Assistant Secretary of State for Educational and Cultural Affairs Ms. Ann Stock.

Recently, AFS-USA held its third National Volunteer Assembly and welcomed AFS Volunteer delegates from across the U.S. This year’s keynote speaker was Ann Stock, Assistant Secretary of State for Educational and Cultural Affairs. While addressing the Assembly, Ms. Stock highlighted the importance of volunteers in the work of public diplomacy. “To thousands of international exchange participants, you are the public face of America. You play a vital role in strengthening U.S. standing in the world.”

While in St. Louis, Ms. Stock also met with AFS Exchange Students currently hosted in the area, their host families, educators, and AFS Volunteers. The exchange students who met with the Assistant Secretary are participating through the ECA-sponsored Kennedy-Lugar Youth Exchange and Study Program (YES), the Congress-Bundestag Youth Exchange (CBXV), and Future Leaders Exchange (FLEX) programs, which Ms. Stock said “are the most important public diplomacy initiatives we can conduct. Inherited in these programs is a growing overseas presence and your efforts here at home have made these programs a model in the exchange community.”

AFS-USA | One Nationwide Street, 3rd Floor | New York, NY 10001-2692 | fundraising@afs.org | 121-1877158

uncommon minds for uncommon missions
Show donors that you know who they are!
Personalized Certificates of Appreciation enhance relationships

Certificate of Appreciation

Mercy Corps gratefully recognizes

Chris Q. Sample

for saving lives around the world.
Thank you for your outstanding commitment in 2010.

Dan O'Neill
Founder

Matching Gift Offer Enclosed.

Please Respond by: December 1, 2010

www.lautmandc.com
Sto, Ethiopia
350 consumers
GPS: 14.08436111, 38.54647222
Before this new hand dug well was installed, the villagers were walking 45 minutes to a dirty, low yield river. The residents of Sto are ecstatic to have clean water for the first time.
Partner: A Glimmer of Hope & REST
Sponsored by: Pete Cashmore @ Mashable / H2O Africa Foundation
Hand-dug well, completed: Summer 2009
Donate a well at charitywater.org
Copy Tips to Strengthen the Relationship Between Donor and Your Organization

- Focus on the donor – not the organization.
- Use “you” as often as possible.
- Make it clear the donor’s support is making a real difference.
- Remind donors how long they have been giving.
- Letter should be warm and emotional – not institutional.
- Use specific, illustrative examples.
A Simple Phone Call Saying “Thank You for Your Support!” Can Go a Long Way

- Call donors who give $250+ gifts.
- Call donors who gave last year but not this year – just to say thanks.
- Recruit staff and board members to participate. Depending on mission, beneficiaries could help make meaningful thank you calls.
Create a System to Track Donor Communication Preferences

- Allow donors to request less mail.
- Ask donors if they want to opt out of list exchange.
- Let donors know you heard them. “This is the one appeal you requested!”
Resource Library

- *Building Donor Loyalty*, by Adrian Sargent
- *Zen of Fundraising*, by Ken Burnett
- Web article with acknowledgment tips – [www.sofii.org/node/258](http://www.sofii.org/node/258)
Thank you!

Lisa Maska, CFRE  
lmaska@lautmandc.com

Betsy Wason, CFRE  
bwason@pcrm.org
Don’t forget to visit the Solutions Showcase!

Many of the ideas discussed today are on display at the Solutions Showcase!