

Creating and Retaining Donor Relationships

Christine Corbett
Director of Philanthropy
AKA Friend-raiser
David's Refuge



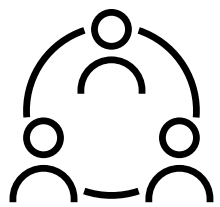
Housekeeping



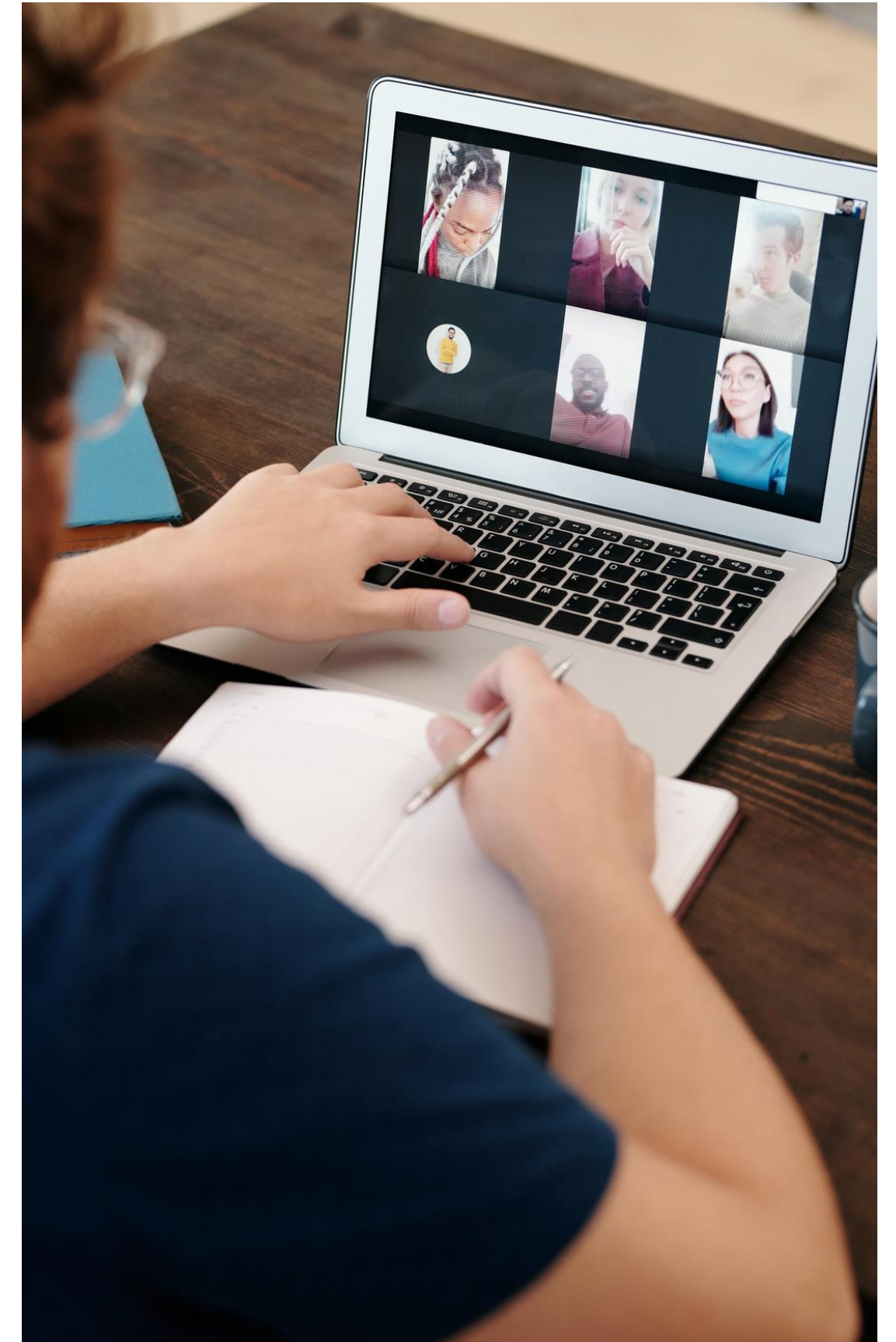
Good To See You. Let's Collaborate & Interact



I'd Love Get Your Thoughts & Questions



Let's Get Connected



POLL

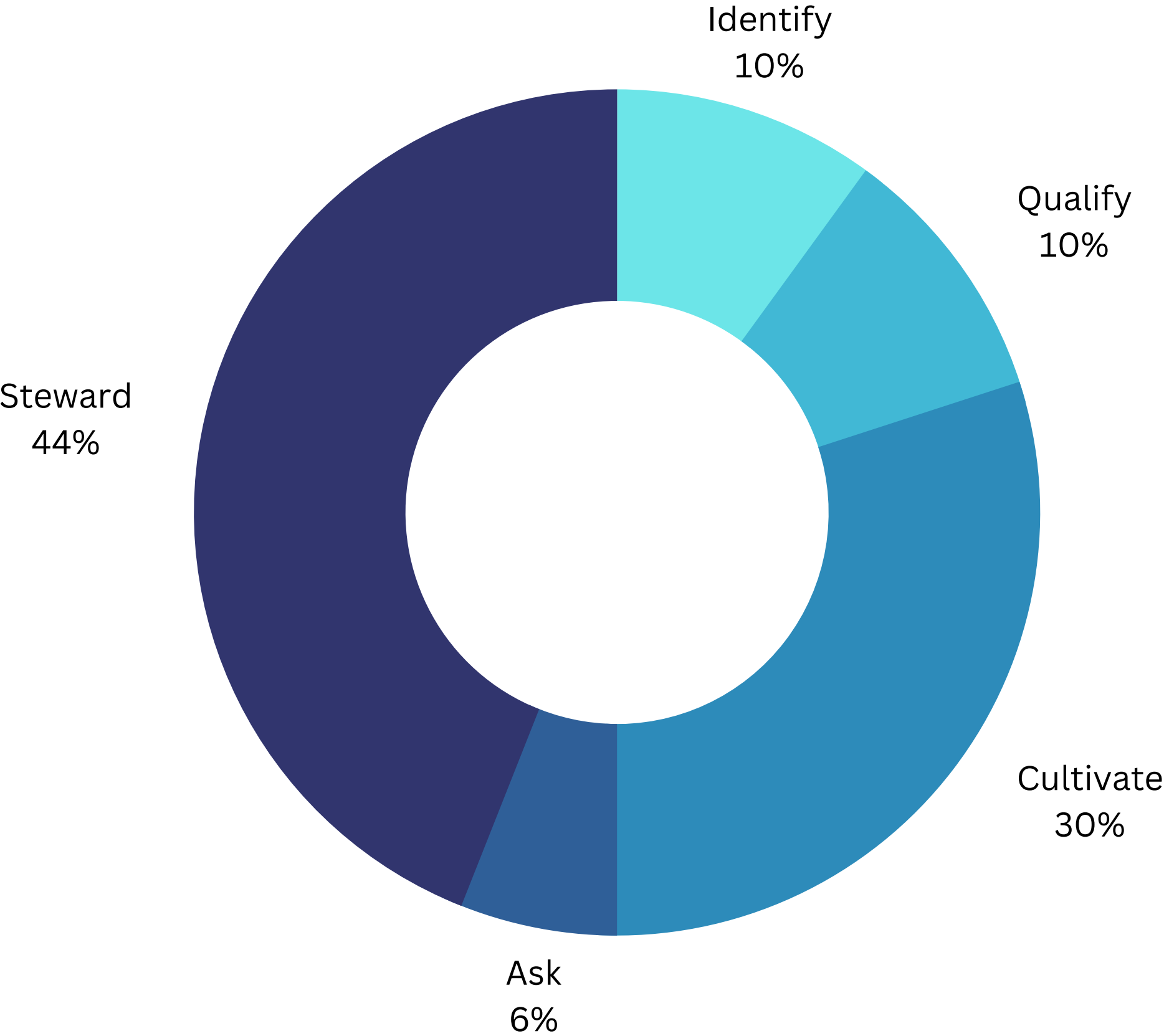
**Do You Have A Documented Plan For
Cultivation & Stewardship in Your
Organization?**

A. Yes

B. No

Cycle of Giving

Where Do You
Spend Your Time?



Who Are Your
Friend-raisers?

Cultivation = Let's Make Friends

Cultivation is where you get to know your donors. Find out things you have in common, and what they like most about your mission.

What do you want to know? What motivations can you uncover?



Stewardship = Thank Your Friends

A process whereby an organization seeks to be worthy of continued philanthropic support. (AFP)

Gift Acknowledgments

Donor Recognition

Honoring Donor Intent

Prudent Investment

Effective & Efficient Use of Funds





FRIENDSHIP

LISTEN.
LISTEN...



*Thank
You*



POLL

What Is Your Donor Retention Rate?

- A. Around 20%**
- B. Around 30 %**
- C. Around 40%**
- D. Don't know**

Planning

Stewardship Plans are vital to ensure you aren't lacking in love for anyone.

Data matters here, but don't get lost in the numbers. You can slice the donor pie every which way, but at the end of the day, stewardship and cultivation should happen in a personal way.

- Who are your audiences/cohorts/giving levels/donor circles?
- What do they want most, or expect, in return for their investment?
- How do they want to communicate with you?



POLL

Which could be considered part of your stewardship strategy?

A. An email from your CEO

B. A newsletter

C. A personal visit

D. All of the above

Stewardship Plans

There are a hundreds different ways to create a stewardship plan.

Document.
Revisit .
Revise.

	Jan	Feb	March
Leadership donor	Email from CEO		Newsletter
Monthly Donor	Note from client	Handwritten card	Birthday Card
Online Donor	Email thank you		Recipient Story
Event Attendee		Survey	
Legacy donor	Happy New Year	Personal Call	Email appreciation
Board	CEO State of the Union	Guest quote	Make a TY Call
Volunteers	Happy New Year	Newsletter	Personal Visit
Staff			Staff
In Kind Donors		Handwritten TY	Handwritten Note

POLL

Who are your Friend-raisers?

A. Staff

B. Volunteers

C. Beneficiaries

D. Donors

E. All of the above

Who Are Your Friend-raisers?



STAFF



VOLUNTEERS



BENEFICIARIES

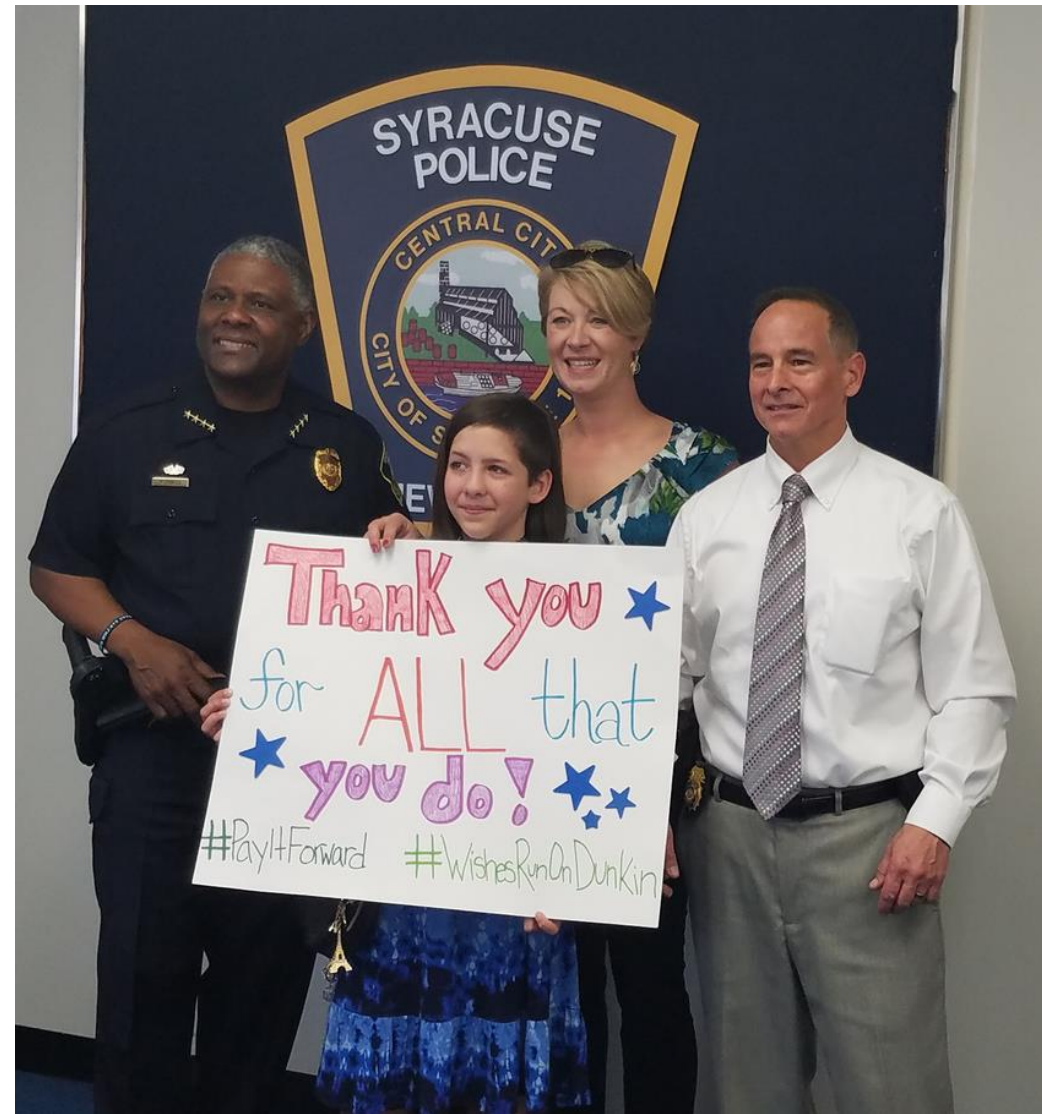


DONORS



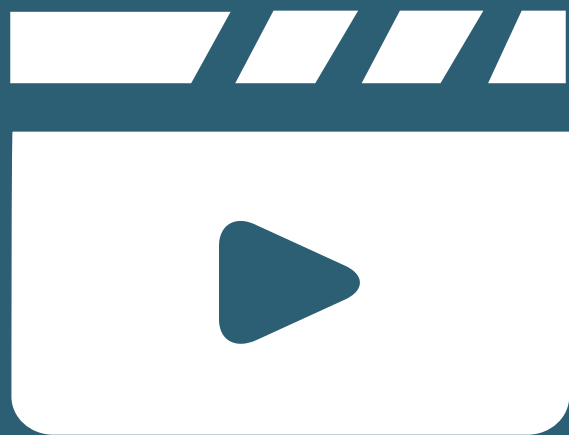
Work Your Plan

Turn your plan into a routine





FUN-RAISING



Tactics - Have Some Fun

WHAT

- Notes
- Phone Calls
- Visits & Tours
- Surveys
- Plaques
- Awards
- Videos
- Social Media
- Volunteerism
- Impact Report

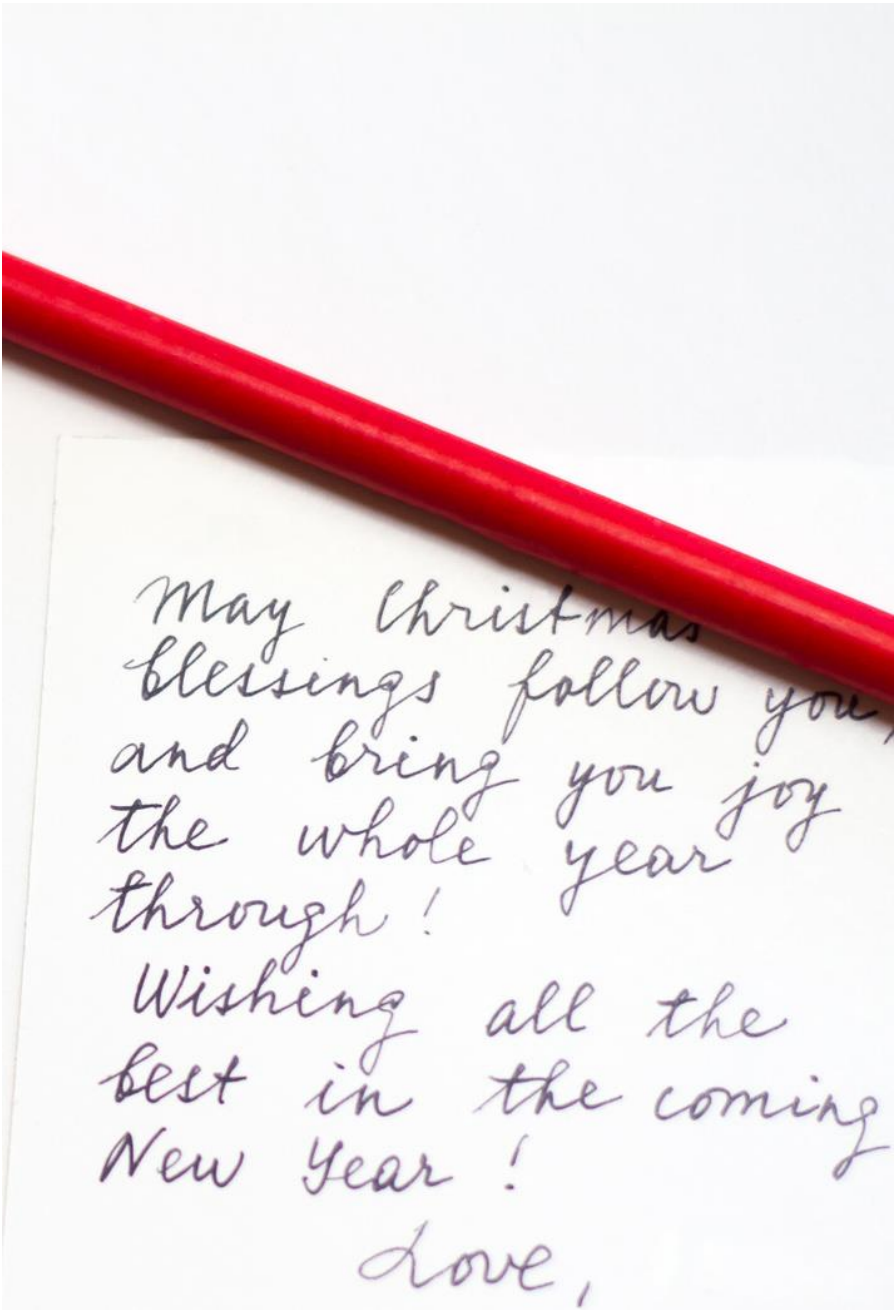
WHO

- Leadership Donors
- Board
- Volunteers
- Staff
- Corporate Partners
- P2P Fundraisers
- Monthly Donors
- Event Donors
- In-Kind Donors
- Legacy Supporters



**Be Creative! Remember,
Non profits are vehicles
for change....Donors are
the drivers**

What Works



What Doesn't

OFFICERS

Daniel Inouye,
President

Jeff ~~Brigger~~,
Vice President

Jennifer Fonda,
Secretary

Steve Fine,
Treasurer

TRUSTEES

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Dan Buhrmann*

Rick Darby
Beth Fink

Sean French
Maira Shea

Kate Thomas*
Robert Ulrich

Laura White

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Jerry McLaughlin
Gary Meckler

Debra Rutledge*
Chuck Sweeney

Dian ~~VanderWell~~,
Jim Van Winkle*

STAFF

Christi ~~Cakiroglu~~,
Executive Director

Deidre Kennelly,
Program Director

J Merriman,
Program Administrator

*Past President

October 9, 2012

Name

Company

Address

City, State Zip

Dear Name,

On behalf of our Board of Directors, Committee Members, and staff, I would like to thank you for your support of Keep Truckee Meadows Beautiful. Your \$5,000 donation will go a long way to helping make Truckee Meadows a better place to work and do business.

For more than 20 years, Keep Truckee Meadows Beautiful has been dedicated to creating a cleaner, more beautiful region through education and active community involvement. Our 10 programs serve the community full circle, from teaching children about the waste stream and litter abatement, to engaging neighborhoods and businesses in cleanups, to forming the Illegal Dumping Task Force and closing the loop on criminal activity.

Thank you again for your support of our organization. We take great pride in our mission and our accomplishments, and with your help, we can become America's cleanest community!

Best regards,

Daniel Inouye
President of the Board
Keep Truckee Meadows Beautiful

Keep Truckee Meadows Beautiful (KTMB) is a non-governmental nonprofit.
KTMB is supported by individual and community contributions.

Saying Thank You



Events



Volunteerism



It Happens.....

Offer yourself some grace and learn from mistakes

I think I look like this



This is how I look to them



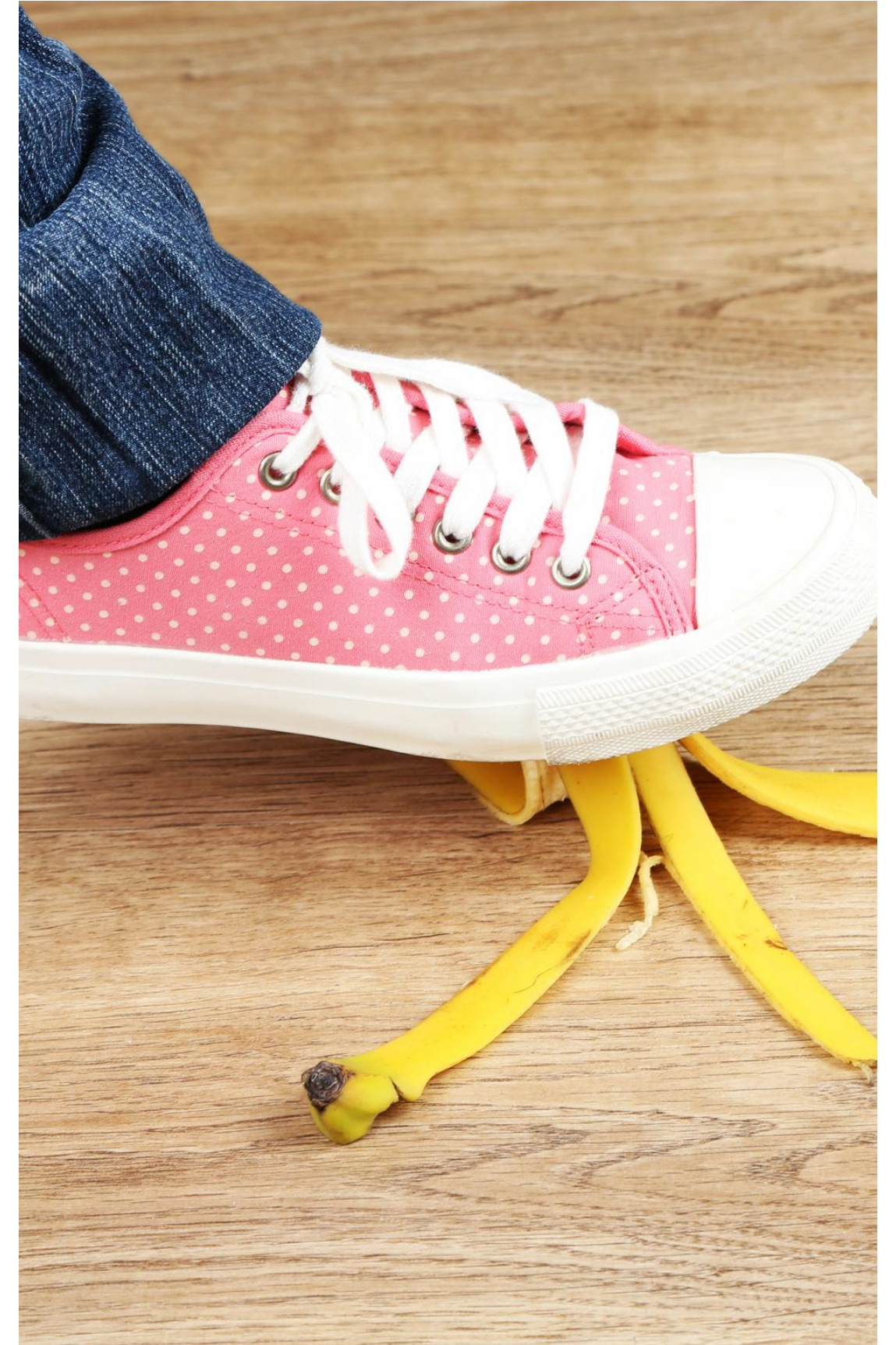
My Donor's Face



Mis-Steps

They happen – just be sure we learn from them!

- Do we know the donor better now?
- How long has it been since we connected?
- How do we handle our mistakes?



○ ○ ○ ○

FUN-RAISE

FRIENDRAISER

○ ○ ○ ○

QUESTIONS



Open For Questions & Conversation



Final Take Aways



Please Share Your Feedback and Suggestions



THANK YOU

*MAKE FRIENDS
& HAVE FUN*

CONTACT ME



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