

TIPS AND TRICKS FOR EFFECTIVE DONOR STEWARDSHIP AND PROSPECTING



There are 1.8 million organizations that make up America's nonprofit sector, and 10 million nonprofits around the globe. Millions of Americans devote their time and money to a favorite organization or cause. Through effective donor stewardship and prospecting, it is possible to bring personal and social benefits to everyone you engage with professionally, and many personally.

-GENEROSITY NETWORK, JENNIFER MCCREA AND JEFFREY C. WALKER

Why are we here?

- ▶ What is the goal of this session?
- ▶ What do you hope to leave with?
- ▶ What do we hope you leave with?
- ▶ What will we be doing for the next hour or so?

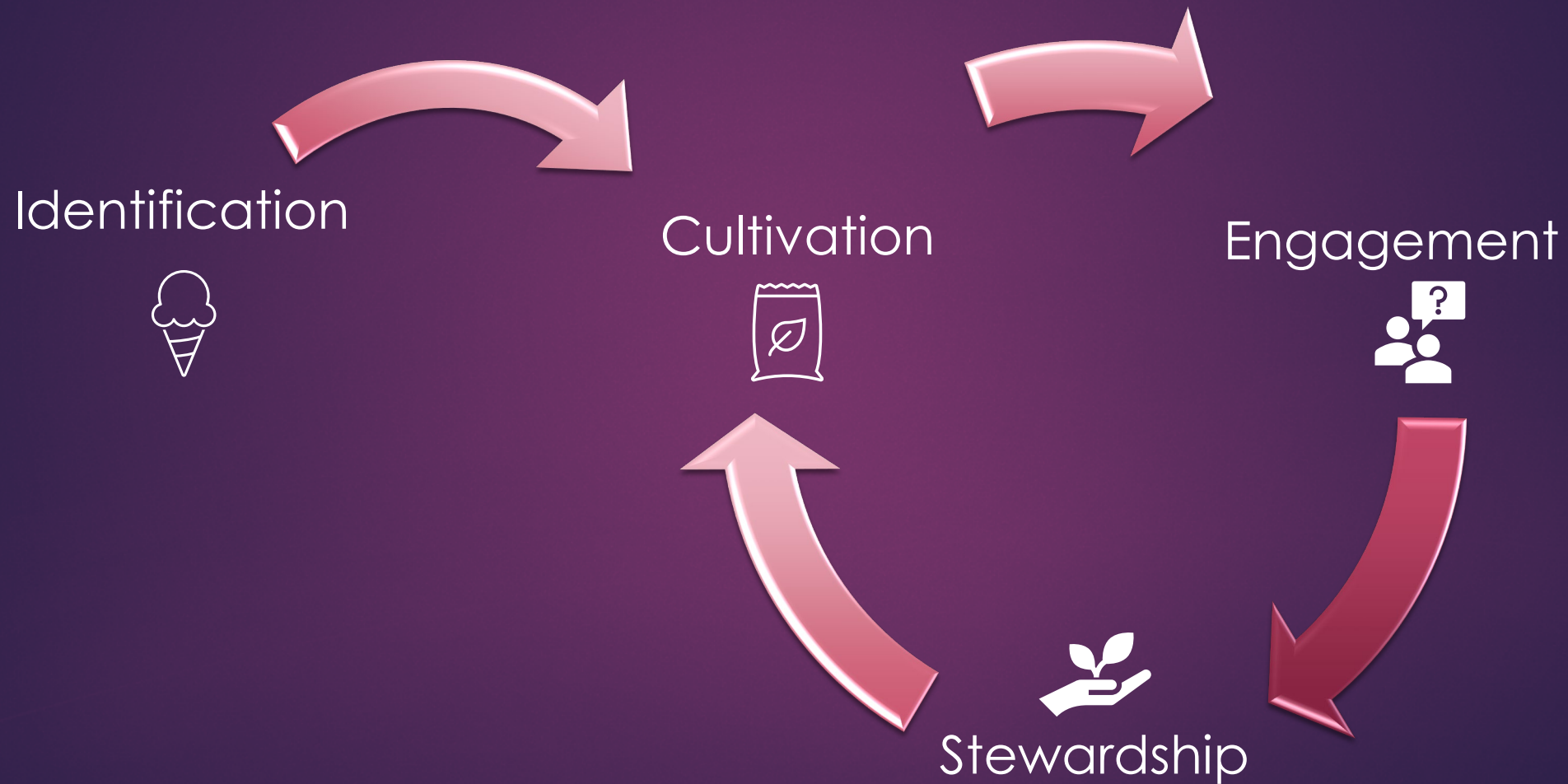


10,000 Foot View

- ▶ What does Donor Stewardship and Prospecting mean?
- ▶ Traditional approach (the F word)
- ▶ Why is it important?
- ▶ How do you measure success?



Donor Lifecycle – I.C.E.S.



DONOR COMMITMENT CONTINUUM

IGNORANCE

FAMILIARITY

INTEREST

EXPERIENCE

ADVOCATE

OWNERSHIP

A background image showing a group of people, primarily of African descent, holding hands in a circle. The focus is on the hands in the foreground, while the faces of the people are blurred in the background. The lighting is warm and soft, creating a sense of community and collaboration.

IDENTIFICATION

- ▶ Process
- ▶ Tips and Tricks
- ▶ Role of the Board

Strategies for Identification of New Donors & Cultivation Opportunities

Existing Donor Base

Community
Outreach

Board Input

Events

Donor Engagement
Committee

A close-up photograph of a hand sowing small, light-colored seeds into dark, rich soil. In the background, several small green seedlings with thin stems are already growing from the soil. A semi-transparent black rectangular box is overlaid on the right side of the image, containing white text and a list of topics.

CULTIVATION = Planting the Seed

- ▶ Process
- ▶ Tips and Tricks
- ▶ Role of the Board



5 x 5 - Plan for Donors: Invite. Engage. Inform. Ask.

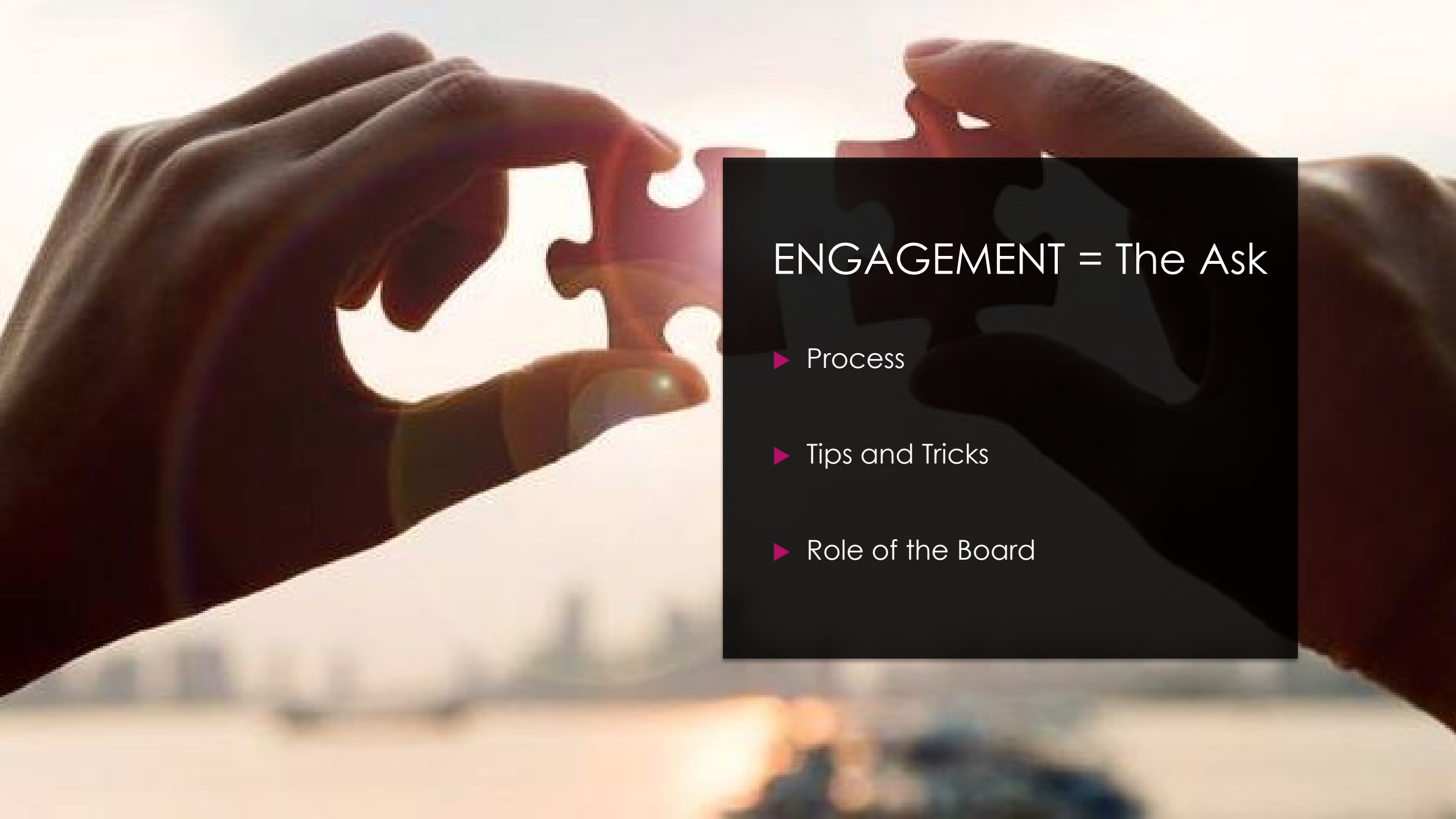
Donor Names: 1. _____ 2. _____ 3. _____ 4. _____ 5. _____

Relationship Builder (Volunteer/Staff): _____

Ideas	Month/Donor	1.	2.	3.	4.	5.
Phone Call In-Person Visit Birthday Card Anniversary Card Personal Note Newsletter Email	January					
	February					
	March					
	April					
Invitation to: Lunch/Coffee Club Tour Special Event Judge a Club Event Volunteer Serve on Committee	May					
	June					
	July					
	August					
Announcement: Campaign Success Program Success Youth of the Year	September					
	October					
	November					
	December					
Congratulations: Award Achievement Birth of a Grandchild Wedding Promotion						

Sample Plan for Donor Cultivation

5 x 5

A background image showing two hands holding red puzzle pieces against a warm, sunset-like sky. A dark semi-transparent rectangle is overlaid on the right side of the image, containing text.

ENGAGEMENT = The Ask

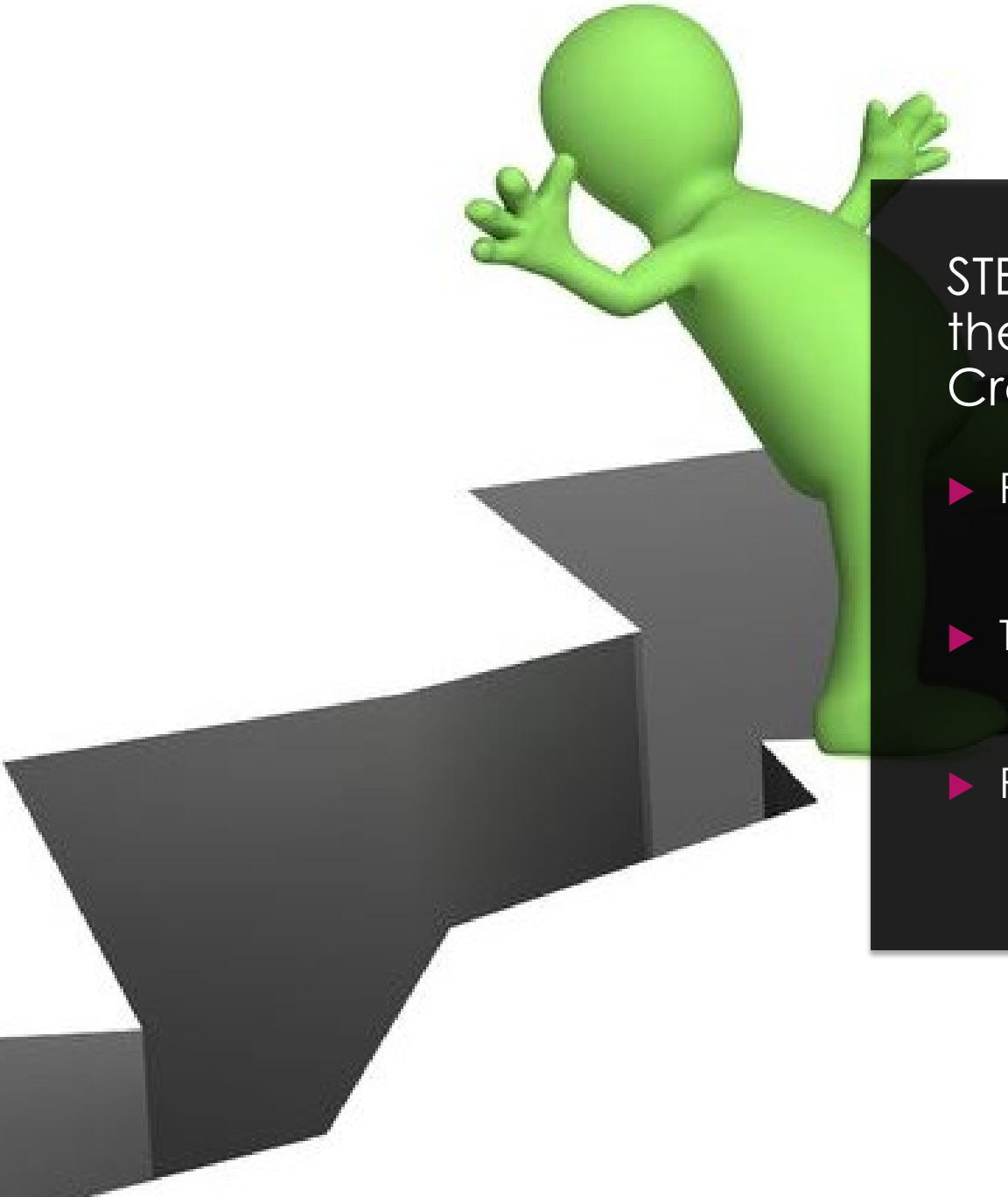
- ▶ Process
- ▶ Tips and Tricks
- ▶ Role of the Board

Psychological Barriers to Giving

- Too Many Choices
- Burdensome & Tedious Tasks
- Lack of Urgency
- Fear of Attention and Public Scrutiny
- Perceived Need to Learn More
- Lack of Trust in Nonprofits and Others
- Possibility of Uncomfortable Family Dynamics
- Feeling Too Uncomfortable with Risk
- Operating in a Scarcity Mindset
- Lack of Time

Solutions for Overcoming Barriers



A 3D rendered green humanoid figure is shown in mid-air, having just fallen off a grey, angular ledge. The figure's arms and legs are outstretched in a panic. The background is a plain white surface.

STEWARDSHIP = Don't Let
them Fall Between the
Cracks

- ▶ Process
- ▶ Tips and Tricks
- ▶ Role of the Board

Basics of Gift Acknowledgement

- ▶ Tax Acknowledgement Information ([IRS Webpage](#))
 - ▶ Donor's name
 - ▶ Organization's name & tax-exempt status
 - ▶ Date of the donation
 - ▶ Description & amount of the gift
 - ▶ Statement: "No goods or services were provided by the organization" OR a description of the goods and services provided
- ▶ DAF Grants

DONOR ACKNOWLEDGMENT PROTOCOLS

FIRST TIME DONORS (Best Practice to Call/Email all Donors)

\$0-\$250	Email or Call
\$250-\$500	Call
Over \$500	Call

ALL DONATIONS

\$250-\$500	Card signed by ED and Donor Relations Manager, Call from ED or DRM
\$500-\$1000	Card from Board Member, Call from ED or DRM
Over \$1000	Card from Board Member, Call from ED

Donor
Acknowledgment
Matrix

Simple

Donor Acknowledgement Matrix

Strategy	\$100-\$250	\$250-\$500	\$1,000-\$10,000	\$10,000+	Everyone
Official letter with tax information – from Gardner (and Susan?)	✓	✓	✓	✓	✓
Added to Email Communications/Newsletter	✓	✓	✓	✓	✓
Invitation to special events	✓	✓	✓	✓	✓
Thank you from client	✓	✓	✓	✓	✓
Social media thank you		✓			
Recognition in Annual Report	✓	✓	✓	✓	✓
Thank You telephone call		\$500 ✓	✓	✓	✓
Handwritten note from Susan			✓	✓	✓
One-on-one meeting			✓	✓	✓
Donor thank you reception			✓	✓	✓
6 personal emails per year			✓	✓	✓
Thank you letter from Board member			✓	✓	✓
Invite to tour program or Ranch			✓	✓	✓
Profile in Newsletter				✓	✓
Video thank you				✓	✓
Gift anniversary recognition			✓	✓	✓
Photo booklet					✓

Donor
Acknowledgment
Matrix

Detailed



The Importance of small Steps

Be the person your dog thinks you are



- Be real!
- Authenticity and passion are what go the farthest
- You don't have to be perfect



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THANK YOU!