Welcome!
We’ll get started at 9 a.m. ET.

- Introduce yourself using the Chat feature.
- Select “All panelists and attendees” before sending your message.
- Use the Q&A tool to ask questions.
Inspiring New Networks
Of Supporters

2020 Online Fundraising Academy
GlobalGiving
It aims to **ENHANCE** your organization’s online fundraising in time for the largest donation month of the year.

**Online Fundraising Academy Objectives**

1. **Bring you unseen case studies, tips, and strategies designed to **BUILD** on what we’ve learned previously.**

2. **APPLY** your knowledge through homework and a more localised context.
Webinar Guidelines

• Comments → Chat
• Questions → Q&A
• If experiencing audio/technical issues, leave webinar + rejoin
• Webinar recordings + slides on Academy Hub page in 24 hrs
Please input your question...

Send Anonymously

Chat

All Panelists

☑ All panelists and attendees

To: All panelists...

Your text can be seen by panelists and other attendees
<table>
<thead>
<tr>
<th>Agenda</th>
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</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
</tr>
<tr>
<td>Finding New Donors Through Data and Advocates</td>
</tr>
<tr>
<td>Major Donors Stewardship</td>
</tr>
<tr>
<td>Atlas Corps’ Strategy on Acquiring New Donors</td>
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<tr>
<td>Q &amp; A</td>
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<tr>
<td>Next Steps</td>
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</tbody>
</table>
OBJECTIVES

- To learn different ways to understand your donors and how to use this information to find new donor networks
- To understand how to grow your network through support of your advocates
- To learn how to manage a relationship with major donors
- To learn from an organization about their experience with finding new donors
Meet your team!

Jasmine Adams
Program Officer: Learning and Engagement

Holly Belkot
Manager of Strategic Initiatives

Abby (Flottemesch) Robinson
Chief Development & Engagement Officer, Atlas Corps

Anna Juszczak
Program Fellow
“Start where you are, use what you have, do what you can.”

Arthur Ashe
Understand Your Current Donors to Find New Donors

Why and How to Understand Your Donors
How to Use Data to Inform Your Search for New Donors
Where to Find YOUR Next Donor
Why is it important to understand your donors?
Donate to GlobalGiving!
Hi Jane!

We know you want to eradicate homelessness from your community. **Let’s work together to do so!**

We hope Buster is doing well!

Billboard located in Jane’s town
A focused strategy leads you towards the most favorable outcomes.
Ways to get to know your donors

Donation Data & Demographics/Behaviors
There is no exact formula. This is a combination of art and science.
Donation Data

- Donation Amount
- Giving Frequency
- First Time vs. Recurring
GlobalGiving provides you with donation data!
When you download this data, your donors’ names will be included (except for those who donated anonymously).

**Please do not:**
1. Send this data via email
2. Put it in a public drive
3. Post it anywhere public to ensure your donors safety

!Keep your donors’ privacy top of mind!
Start on Your Dashboard and Click on “Donations”

Scroll down to the bottom of your Donations page until you see this:
Press “Excel” and Don’t Get Scared
Excel is your FRIEND!

Look for Repetition and Outliers

**Focus on data from the past 2 years**
1. **Payment Method:** How the donor paid (e.g., credit card, check, Paypal, GlobalGiving gift card, etc.)
2. **Recurring:** Indicates by Yes or No whether the donation will recur every month
3. **Corporate Gift Cards:** Was the donation made using a corporate gift card
4. **Tribute/In-Honor Donation:** Was the donation made in-honor of someone
5. **Recurring:** Indicates by Yes or No whether the donation will recur every month
6. **Recurring Status:** How many total recurring donations the donor has made
7. **Quantity:** The number of donations
8. **Amount:** The amount of money donated. This column does not take into account GlobalGiving’s fee, which you’ll see deducted in your disbursement report.
9. **Total Amount:** Total amount to the project (Quantity multiplied by Amount)
10. **Currency:** What currency the donation was made in
11. **Disbursed:** Indicated by Yes or No whether the donation has been disbursed yet
### Key Findings + Takeaways

#### Trends/Finding

<table>
<thead>
<tr>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
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<tr>
<td>Home</td>
<td>Traffic Source</td>
<td>Payment Method</td>
<td>Date</td>
<td>Tribute/In-Honor</td>
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<td>No</td>
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<tr>
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<tr>
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</tr>
<tr>
<td>facebook</td>
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</tr>
<tr>
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<td>Dec 1, 2019</td>
<td>No</td>
<td>Yes</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

#### Key Takeaways/Next Steps

- **A donor has donated 21 times (total $210)**
  - Do we know this donor? If not, can we send a thank you note during their next donation asking them to be a fundraising advocate?

- **A donor who donated $2,500**
  - Major Donor Alert! Do we know them? How did we thank them? Can we send them an appeal to ask them for their support on #GivingTuesday 2020?

- **Donors accessed a link from Facebook on Dec. 3**
  - Potential successful communication strategy for #GivingTuesday

- **Tribute/In-Honor donation seem to be popular**
  - Potential for a campaign highlighting Tribute Donations
Demographics/Behaviors

- Age
- Location
- Hobbies
- Education Level
Where to Find Donor Demographics?

- **Google Search.** You will not find everyone via a Google search, and that’s okay!
- **Social Media** such as LinkedIn, Instagram, Facebook
- **Reach out to them!** Let them know you want to start a relationship. Don't ask them about their demographics! Actually get to know them.
Add Your Newsletter!

Add your direct newsletter sign-up link to your organization’s dashboard by clicking “Edit Org Info” and adding the link on the first tab under “Email Signup Link.”

GlobalGiving will add that link to email templates for project reports, thank you notes, and project appeals.
Tips When Researching Donors

Not everyone you search will have information online.

Common names bring up a lot of people. **Don’t spend too much time** trying to determine the correct person. (Use their email or currency to make an inference.)

It will be easiest if you look for **general trends** during this step.

**DO NOT** reach out to donors at this time. Be respectful of your donors’ privacy!
Researching Anna Juszczak

Demographics
- Female
- College Educated
- In her 20s
- Lives in Chicago
- Speaks Polish
- Nonprofit Employee

Education
- DePaul University
  - Bachelor's degree, Marketing
  - 2014 – 2018
  - Activities and Societies: Panhellenic Council

Accomplishments
- Organizations:
  - DePaul Panhellenic Council
  - uterus mentor
  - Alpha Phi Pri Sorority
  - Sigdai Panhellenic Council
- Honors & Awards:
  - Academic Excellence: Kellogg Marketing Center Scholarship Award
  - Deans Award for Scholarly Excellence
- Languages:
  - English
  - Polish

Acting as a resource and a partner, Anna works directly with nonprofits to help further their social impact and reach their fundraising goals. Anna received a B.S. in Marketing from DePaul University. She then spent a year as a Marketing Insights Assistant Manager prior to joining the GlobalGiving team. During her free time, you can find Anna diving deep into the mysteries of life or listening to a “How to Heal Your Soul” podcast. She also loves stand-up comedy, spicy food, and The Office.
Homework

Grouping Your Donors into Segments + Brainstorming Like Networks
Assignment
Grouping Your Donors into Segments

**Purpose:** Identify who your main groups of donors are so you can focus your efforts on presenting your project to donors who are most likely to give.

1. Download your organization’s data and research the donation data and donors
2. Group your donors based on **common characteristics (at least 2-3 commonalities)**
3. Brainstorm where you can find people similar to your donor groups
   a. What groups/events would they most likely attend and could you join one of these events?
   b. Are they a part of a larger network, such as a university, religious institution, or company?
   c. Which museum, which church, what webinar do you want to be a part of?
### Bonuses: Plan Your Outreach and How You Will Engage with These Networks

<table>
<thead>
<tr>
<th>Diaspora</th>
<th>Young Donors</th>
<th>Institutions</th>
<th>Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Present to Consulates</td>
<td>● Join an EventBrite/MeetUp or ask to present at an event</td>
<td>● Google a College Events Board and ask to present</td>
<td>● Attend a LinkedIn webinar</td>
</tr>
<tr>
<td>● Join Facebook Groups</td>
<td>● Do outreach on Social Media</td>
<td>● Reach out to a College News Outlet and ask to be featured</td>
<td>● Attend a Small Business EventBrite/MeetUp and tell them the power of a partnership with a nonprofit</td>
</tr>
<tr>
<td>● Advertise at Museums</td>
<td>● Partner with Podcasts</td>
<td>● Ask to present to a Religious Group</td>
<td>● Present to a Business that has a mutual benefit</td>
</tr>
<tr>
<td>● Present at a LinkedIn Webinar</td>
<td>● Partner with Influencers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Advertise at Restaurants</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Segmentation Tools on GlobalGiving
Dear Donorfirst,

Just like 80% of the students under our program, Priyank and Kirti are the first in their families to ever go to school. They can often be spotted walking to class, hand in hand.

Kirti has never been to any other school before she joined E&H Foundation’s Gyanshala classes and is quite fascinated with her new life. She likes going to class and is especially fond of her teacher. She looks up to her brother for any support, often seeking his advice and feedback.

Project Appeals
Donor Segmentation:

- Active Monthly Donors: 37
- One-time Donors who have given less than $100 (USD): 161
- One-time Donors who have given $100 (USD) or more: 69
- All of the Above: 267
- All Subscribed Users: 303

Your appeal will be sent to 161 people.
Thank You Notes

Donor Segmentation:
- More than $100
- Less than $100
- Recurring

Link for more information:
https://tools.blog.globalgiving.org/2020/04/15/introducing-automated-segmented-thank-you-notes/

Education Provides Refugees With Opportunities For Security and Success

By Claire Hilton - GlobalGiving Fellow

Since 2011, nearly 6 million individuals have left their homes in Syria to seek shelter in surrounding countries. Thanks to the generous support of more than 10,000 GlobalGivers, we have been able to raise $1,857,797 to help families gain access to vital resources in the face of what many call the greatest humanitarian crisis of our lifetime.

Lebanon hosts more than a million of these displaced individuals.
Find New Donors with Help from Your Advocates

Grow Your Organization’s Trust Online

Fundraising Advocates

GlobalGiving Fundraisers
Grow Your Trust Online with Help From Your Advocates

a. Ask them to give you a Google and/or Facebook rating
b. Ask them to like your posts on social media
c. Ask them to follow you on your social media platforms
Fundraising Advocates
Fundraising Advocates Build Bridges to Your Secondary and Tertiary Networks
## Characteristics of a Great Fundraising Advocate

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>They have a large network of friends, family, etc</td>
<td>They are passionate and positive about your cause and interested in your work</td>
<td>They know your story and can act as brand ambassadors</td>
<td>You are comfortable asking them to help</td>
<td>They have the time and willingness to work</td>
</tr>
</tbody>
</table>


Coming Soon

This project will start accepting donations on Monday, March 11, 2019 at 09:00 AM EDT:

14 Days 9 Hours 56 Minutes 46 Seconds

Get Updates via Email

your email

We'll only send you email updates about this project.

Help raise money!

Support this important cause by creating a personalized fundraising page.

START A FUNDRAISER

by Empower Foundation
# Create a Fundraiser

## Fundraiser Details

**YOUR FUNDRAISER TITLE**

**YOUR NAME**

**FUNDRAISER PHOTO (OPTIONAL)**

Choose File: no file selected

**FUNDRAISER URL (OPTIONAL)**

```
globalgiving.org/fundraisers/
globalgiving.org/fundraisers/
```

**DESCRIPTION**


**FUNDRAISING GOAL (OPTIONAL)**

```
$ 0
```

---

*GlobalGiving*
I'm running my first marathon to raise enough money to build and run a new school for orphaned and vulnerable children in Swaziland. Having spent a month volunteering with these amazing kids, I was deeply moved by the challenges they face.
How to Reach Out to Your Fundraising Advocates

- How will you make each individual feel invested and excited
- Keep it personal
- Answer any questions they might have
- Provide them with resources and tools they might need to make it as easy as possible for them!
  - “How To Build A Network of Fearless Fundraising Advocates”

Sample Email Messages for Advocates

Tailor the email templates below to your organization and share them with your advocates on a Google or Word document. Remind your advocates to periodically send email appeals to their network throughout the campaign, and encourage them to personalize all of their communications as much as possible. Their friends and family will be more likely to make a donation to your cause if they understand their friend or family member’s personal passion and commitment to your cause. When you communicate with your advocates, share helpful fundraising tips and messages of encouragement and gratitude.

TOOL YOU CAN USE: Advocate Email Template: Week 1

Hi [Name],

I am passionate about [Theme or issue area of organization] because [Personal story about connection to the cause].

It would mean the world to me if you would support [Name of organization]. Their team is trying to raise [Fundraising goal] in order to [Primary objective of campaign]. Because I believe in what they do, I committed to personally raising [Advocate’s fundraising objective] for this important cause by [Date].

Can you help me? You can donate today at [URL where donation can be made].

Sincerely,

[Advocate’s name]
Summary of All Time

Omitted for GlobalGiving, as these stats take too long to load.

GG Rewards

Rewards Status: Superstar
Search Rank: 4

EARN MORE POINTS
GET BADGES

Recent Activity

Omitted for GlobalGiving, as these elements take too long to load.
Major Donor Stewardship
Hello!

My name is Holly!

I am here today to share with you best practices in Donor Stewardship and Major Donors.

I am thankful that you are all here!
Donor Stewardship is the effort that you/your organization puts in to ensure that donors have a positive and meaningful experience. It is meant to ensure

- **Increased donor retention**
- Encourage donors to **give more** than they have in the past
- **Build community** engaged in your mission
Donor Stewardship

*Step 1: Resource Review*
Review Your Resources

- **Time**
  - Who has time to work on donor stewardship?
  - How much time?
  - Be Realistic

- **Volunteers**
  - Do you have a list of past and present volunteers (If not, make one)
  - Volunteers are likely to give, but they are also able to help with things like writing thank you notes.
Review Your Resources

- **Database of donors**
  - If you don’t have one, you need to make one
  - *Repeat* - If you don’t have one, you need to make one.

- **Emails/ Mailing Addresses/Phone Number**
  - One is great, two is better, all three is fantastic
  - If you have a guestbook - collect information

- **Social Media**
  - LinkedIn
  - Organization Facebook (not personal)
Donor Stewardship

Step 1: Donor Review
Who is a “Major Donor”?

Identify your top 5 - 10 individual donors in the past year

- Exclude grants or donations from foundations

- Find the **average** of those donations
  - If you have some outliers, consider removing them

- That is your **approximate** target
  - It could be higher or lower - this is just an exercise.
  - Example: In 2019, your top 5 largest donations were $7500, $5000, $2500, $1000, $1000. Your average would be $3400. Aim for $3,500 donations. It is a reach, but it is possible.
We often talk about “Donors,” but we also need to remember that donors are people.

Major Donor Stewardship is about building relationships with people.

Specifically, people that we want to invest in our mission, care about our community, and partner with us to make change.
Donor Stewardship

Step 2: Communicating with your donors
Thank You’s

Always thank your donors — and do it quickly

- Email
- Cards
- Phone Calls
- GlobalGiving’s Automated Thank You Note Tool
Build Relationships

Get personal
- Tell them the impact of their gift
- Ask them why they gave
- Ask for Feedback
- Tell them about you - why you work/volunteer

Think + Share creative ways of showing appreciation!
- How does your organization thank important donors?
- Example: For an agriculture program - “Name” a tree after a donor and send a photo in your next email.
Opportunities to get involved

- An important donor stewardship best practice is to go beyond thanking your donors
  - You want donors to be emotionally invested in your mission.
- Share other ways, besides giving, that they can get involved
  - Read a story written by a member of your community
  - Follow your Facebook page
  - Volunteer time or services
  - Vote on a Photo Contest
  - Ask for Feedback
Don’t Be Afraid To Ask!

Use Donor Centered Language

- Organization Centered Language
  - *Our work* is supporting vital healthcare workers and saving lives.

- Donor Centered Language
  - *Your gift* will support vital healthcare workers and save lives.
Donor Stewardship

Step 2: Make A Plan
Make a Plan!

You have reviewed your resources, thought of creative ways of reaching out and engaging with major donors.

Next Step: Write it down.
- What are you going to do
- for who
- and at what cadence

*Options and resources linked in the next two slides
**Donor stewardship matrix**

<table>
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<tr>
<th>Acknowledgment</th>
<th>Communication type</th>
<th>Timeline</th>
<th>New donors</th>
<th>Loyal donors</th>
<th>Major donors</th>
<th>Planned giving donors</th>
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<td>Thank you email or call</td>
<td>Within 24 hours</td>
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<td>✓</td>
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<td></td>
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<td></td>
<td>Legacy society invitation</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>Donor highlight in newsletter</td>
<td>Annually</td>
<td></td>
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<td>Reporting</td>
<td>Video update of impact</td>
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<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td></td>
<td>Donor anniversary</td>
<td>Annually</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Donor stories</td>
<td>Quarterly</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Option: Donor Stewardship Matrix**

- This is an example from FreeWill
- Notice that donors based on their giving have slightly different intentional experiences.
Option: Make a Calendar

- This is an example from Giant Squid Group (YES, that is their name)
- This is a Google Sheet that you can download and update with your own information and plan.

### Sample Donor Cultivation and Stewardship Calendar

<table>
<thead>
<tr>
<th>ALL CONTACTS IN YOUR DATABASE</th>
<th>JANUARY</th>
<th>FEBRUARY</th>
<th>MARCH</th>
<th>APRIL</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy New Year Email w/ updates on goals for new year</td>
<td>Plan newsletter &amp; solicitation</td>
<td>Quarterly Newsletter</td>
<td>Spring Solicitation</td>
<td>Plan newsletter and impact report, begin annual report</td>
<td>Quarterly Newsletter</td>
<td>Donor Impact Report (email or infographic)</td>
<td>Plan newsletter &amp; solicitation</td>
<td>Quarterly Newsletter</td>
<td>Fall Solicitation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CURRENT DONORS (WHO GAVE IN LAST TWO YEARS)</th>
<th>JANUARY</th>
<th>FEBRUARY</th>
<th>MARCH</th>
<th>APRIL</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy New Year Email w/ updates on your goals for new year</td>
<td>Plan newsletter &amp; solicitation</td>
<td>Quarterly Newsletter</td>
<td>Board writes thank you notes at meeting</td>
<td>Plan newsletter and impact report, begin annual report</td>
<td>Quarterly Newsletter</td>
<td>Donor Impact Report (email or infographic)</td>
<td>Board writes thank you notes at meeting</td>
<td>Quarterly Newsletter</td>
<td>Fall Solicitation</td>
</tr>
</tbody>
</table>
Thank you!
international network of social change leaders and organizations that promotes innovation, cooperation, and solutions to address the world’s 21st-century challenges
RELATIONSHIPS!

#1 Define You  |  #2 Open the Door  |  #3 Reach Out
Step #1: Define You

● Why are you fundraising?
  ○ Program | Fellows | Grounded

● When are times that you will fundraise?
  ○ July Bonus Day | End of Year | Gala

● How will you reach out?
  ○ Calls | Emails | Letters | Events

● Who will be your target?
  ○ Current | Target
Step #2: Open the Door
How do we find, engage, and inspire new donors?  

General

- **Personal Connections** - our Fellows are our biggest advocates | provide positive experience
- **Social Media** - organic, consistent | balance between telling stories, promoting opportunities, calls to action | cross promote
- **Volunteer Opportunities** - virtual and in-person activities
How do we find, engage, and inspire new donors?  

Specialized

- **External Events** - conferences | civic groups | outside comfort zone | employee giving, CFC

- **Interest Areas** - RPCVs | exchange alumni | Foreign Service

- **LinkedIn Research** - board interest (Gala, Tech, Young Professionals)

- **Skills-Based & Leadership** - speaking | projects | advisory boards
Step #3: Reach Out
How to cultivate relationships?

- **Emails** - nice to meet you | 3 ways to help
- **Events** - personal (virtual opportunity!) | coffee chats | volunteer hosts | Gala
- **Feedback Loop** - surveys | opinions - Gala
- **Newsletters** - monthly | quarterly | special
- **Recognition** - honors, newsletter feature
- **Staff / Beneficiaries** - connections | social media groups
A few helpful tips . . .
What are your circles of support?

- Where are you strongest?
- Where do you have gaps?
- How can you move people closer to the center?
- Who can help?
Tools

- **Database** - spreadsheet, Salesforce
- **Graphics** - Canva
- **Mailing** - AmazingMail
- **Mass Email** - MailChimp, GMass
- **Private Groups** - Facebook, LinkedIn, Slack

*GSuite* - *email + shared storage + numerous apps*
RELATIONSHIPS!

How are you going to build one new relationship today?
Thank you! Make it big!

abby@atlascorps.org | www.atlascorps.org
Questions?
Oswaldo, our Mexican Consultant is now running a Spanish speaking recap session. Link in the chatbox if you want to go & haven’t registered yet!

oswaldoalvizar@globalgiving.org
Mexico & Latin America Partnerships Consultant.

He’s great.
Please fill in this quick poll :) 

It should be launching... now
Next week at the same time (9 AM ET), we’ll discuss effective boilerplate messaging, bring in the world of digital marketing to discuss A/B testing and Google Ads.

South Asia residents, look for an email inviting you to your Regional session soon! (24th Sept 11:30 IST)
Don't forget to fill out homework if you opted in

Filled in the survey but didn’t receive an email? Let us know
thank you