



**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

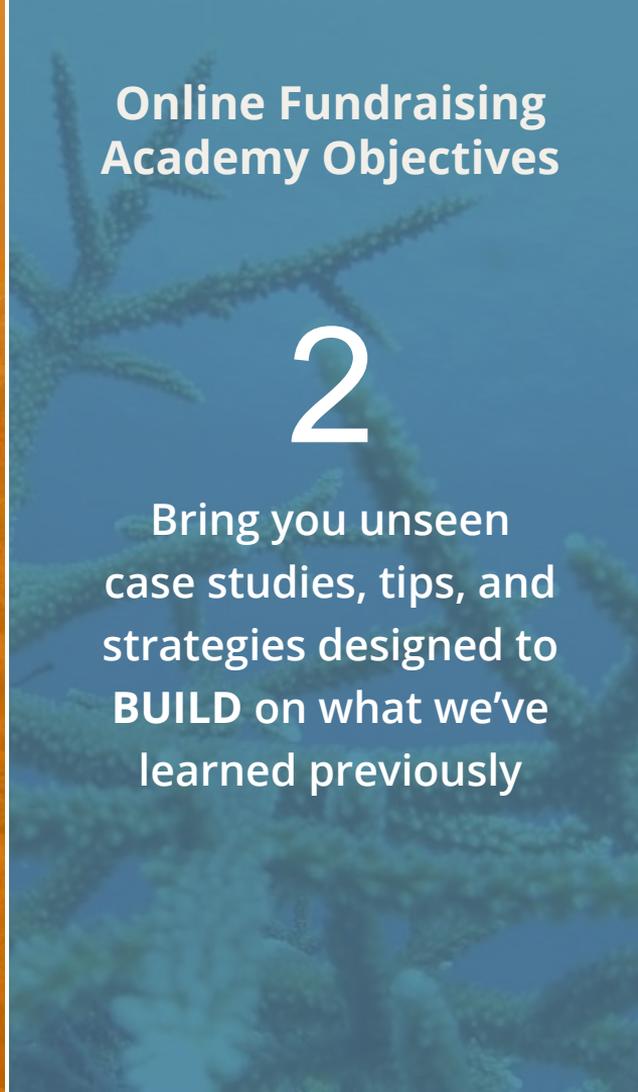
2020 Online Fundraising Academy

 GlobalGiving



1

It aims to **ENHANCE** your organization's online fundraising in time for the largest donation month of the year



## Online Fundraising Academy Objectives

2

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



3

**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



Q&A

Please input your question...

Send Anonymously

Send

Chat

▼

All Panelists

✓ All panelists and attendees

To: All panelis... ▼

Your text can be seen by panelists and other attendees

# Agenda

Introduction

Finding New Donors Through Data and Advocates | *20 mins*

Major Donors Stewardship | *15 mins*

Atlas Corps' Strategy on Acquiring New Donors | *15 mins*

Q & A | *10 mins*

Next Steps

## 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 (Flottesmesch)  
Robinson**

*Chief Development &  
Engagement Officer, Atlas  
Corps*



**Anna Juszcak**

*Program Fellow*

A herd of elephants is walking across a vast, golden-brown savanna. The sky is filled with dark, heavy clouds, with some light breaking through near the horizon. The elephants are in various stages of their herd, with some larger and some smaller. The overall mood is somber and powerful.

*“Start where you are, use what you have, do what you can.”*

Arthur Ashe

# Understand Your Next Donors to Find Donors

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*Why and How to Understand Your Donors*

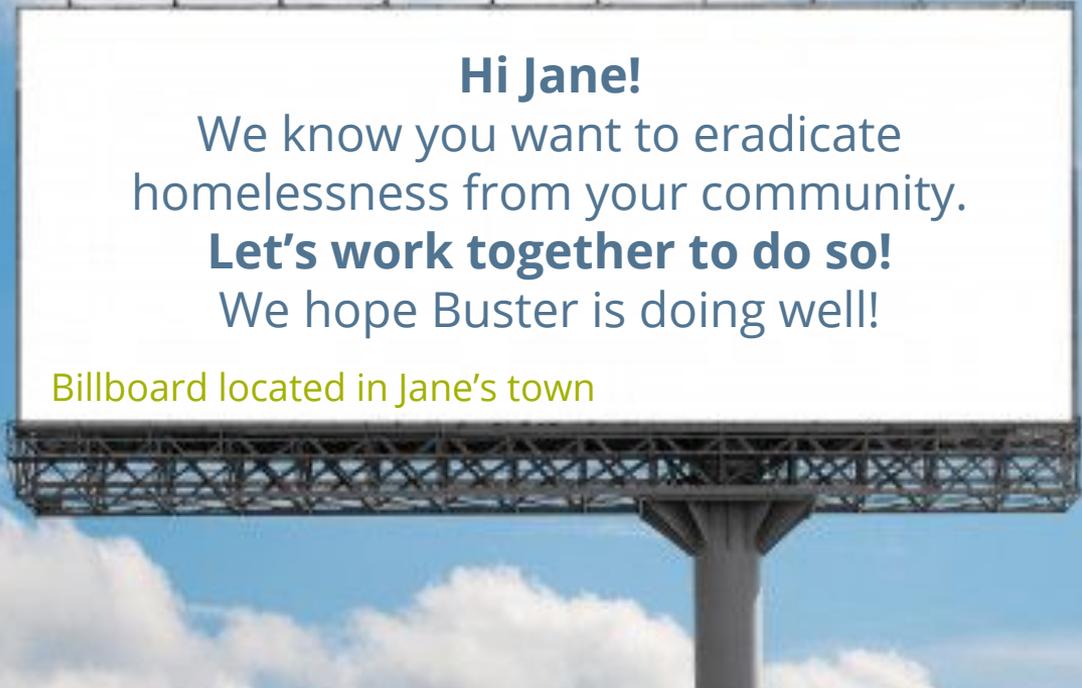
*How to Use Data to Inform Your Search for New Donors*

*Where to Find YOUR Next Donor*

Why is it important to understand your donors?

A large billboard stands against a bright blue sky filled with fluffy white clouds. The billboard is supported by a metal lattice structure and has several spotlights mounted along its top edge. The text on the billboard is centered and reads "Donate to GlobalGiving!" in a dark blue, sans-serif font.

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!

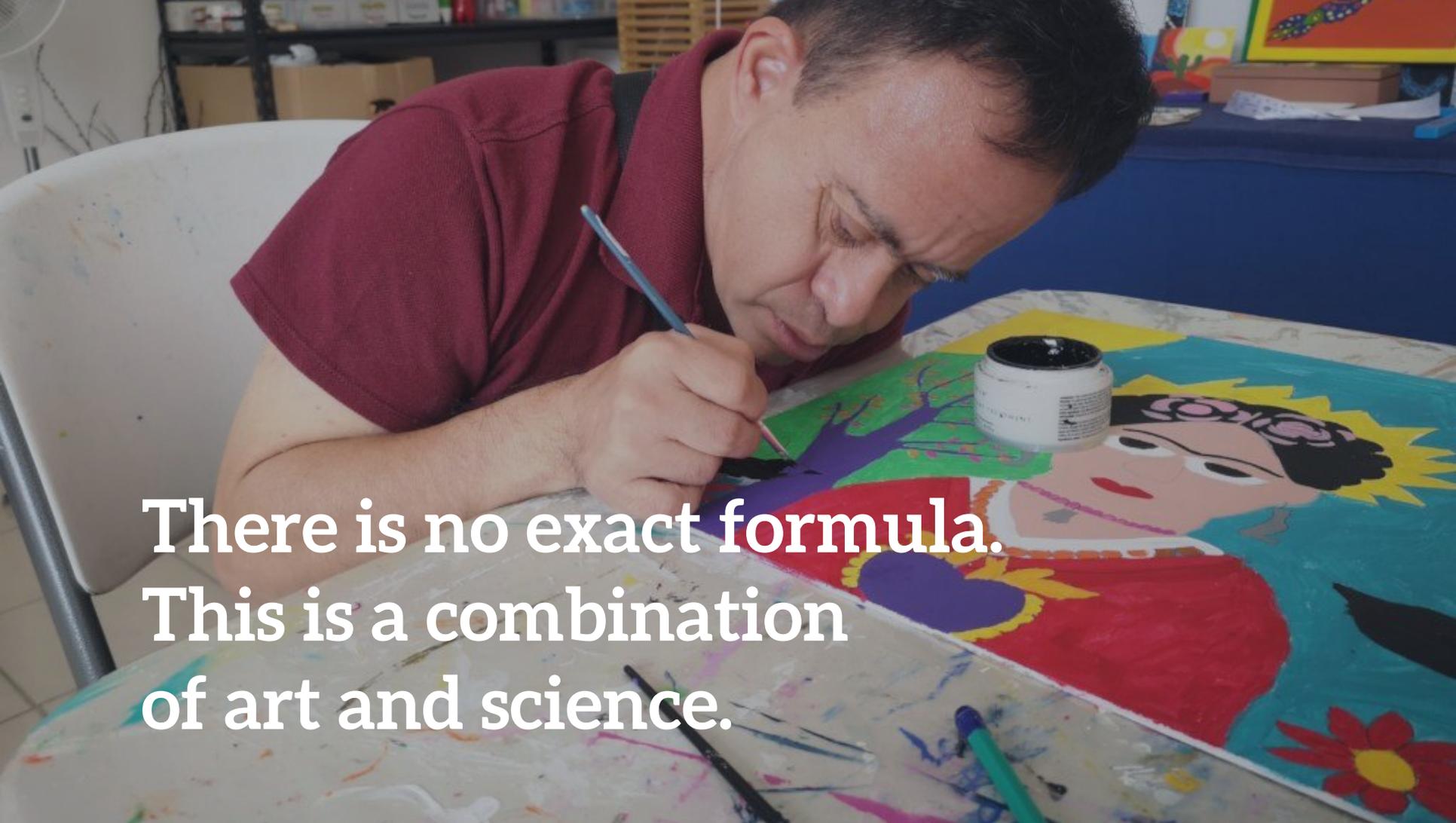
Billboard located in Jane's town

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

provides you with  
ation data!

## Important Reminder Before Accessing Data!

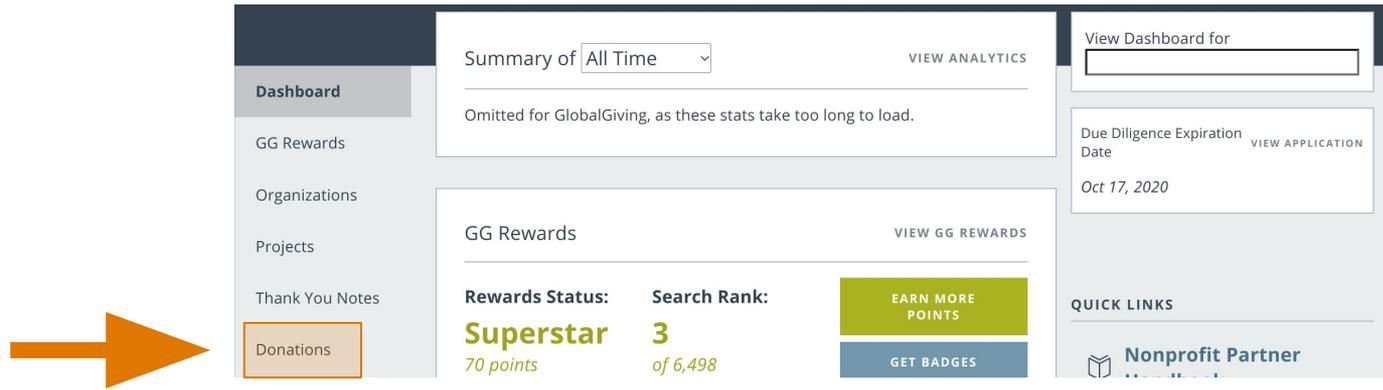
When you download this data, your donors' names will be included (except for those who donated anonymously).

**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”



The screenshot shows the GlobalGiving dashboard. On the left sidebar, the 'Donations' link is highlighted with an orange box and an orange arrow pointing to it. The main content area shows a 'Summary of All Time' section with a 'VIEW ANALYTICS' link and a message: 'Omitted for GlobalGiving, as these stats take too long to load.' Below this is a 'GG Rewards' section with 'VIEW GG REWARDS' link. The 'GG Rewards' section displays 'Rewards Status: Superstar' (70 points) and 'Search Rank: 3' (of 6,498). There are two buttons: 'EARN MORE POINTS' (green) and 'GET BADGES' (blue). On the right sidebar, there is a 'View Dashboard for' dropdown, a 'Due Diligence Expiration Date' section showing 'Oct 17, 2020' with a 'VIEW APPLICATION' link, and a 'QUICK LINKS' section with a 'Nonprofit Partner' link.

Scroll down to the bottom of your Donations page until you see this:

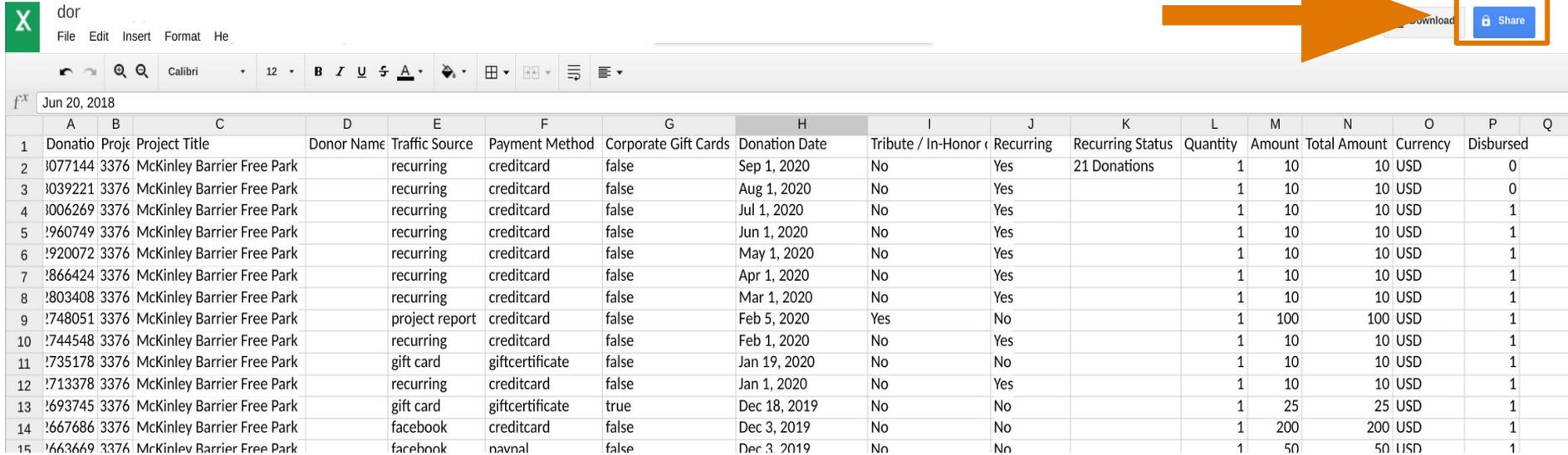
Displaying donations 1 to 100 of 2,468.

← prev 1 2 3 4 5 6 7 8 9 next →

Excel (CSV) XML

# Press “Excel” and Don’t Get Scared Excel is your FRIEND!

Look for Repetition and Outliers



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Donatio	Proj	Project Title	Donor Name	Traffic Source	Payment Method	Corporate Gift Cards	Donation Date	Tribute / In-Honor	Recurring	Recurring Status	Quantity	Amount	Total Amount	Currency	Disbursed	
2	!077144	3376	McKinley Barrier Free Park		recurring	creditcard	false	Sep 1, 2020	No	Yes	21 Donations	1	10	10 USD		0	
3	!039221	3376	McKinley Barrier Free Park		recurring	creditcard	false	Aug 1, 2020	No	Yes		1	10	10 USD		0	
4	!006269	3376	McKinley Barrier Free Park		recurring	creditcard	false	Jul 1, 2020	No	Yes		1	10	10 USD		1	
5	!960749	3376	McKinley Barrier Free Park		recurring	creditcard	false	Jun 1, 2020	No	Yes		1	10	10 USD		1	
6	!920072	3376	McKinley Barrier Free Park		recurring	creditcard	false	May 1, 2020	No	Yes		1	10	10 USD		1	
7	!866424	3376	McKinley Barrier Free Park		recurring	creditcard	false	Apr 1, 2020	No	Yes		1	10	10 USD		1	
8	!803408	3376	McKinley Barrier Free Park		recurring	creditcard	false	Mar 1, 2020	No	Yes		1	10	10 USD		1	
9	!748051	3376	McKinley Barrier Free Park		project report	creditcard	false	Feb 5, 2020	Yes	No		1	100	100 USD		1	
10	!744548	3376	McKinley Barrier Free Park		recurring	creditcard	false	Feb 1, 2020	No	Yes		1	10	10 USD		1	
11	!735178	3376	McKinley Barrier Free Park		gift card	giftcertificate	false	Jan 19, 2020	No	No		1	10	10 USD		1	
12	!713378	3376	McKinley Barrier Free Park		recurring	creditcard	false	Jan 1, 2020	No	Yes		1	10	10 USD		1	
13	!693745	3376	McKinley Barrier Free Park		gift card	giftcertificate	true	Dec 18, 2019	No	No		1	25	25 USD		1	
14	!667686	3376	McKinley Barrier Free Park		facebook	creditcard	false	Dec 3, 2019	No	No		1	200	200 USD		1	
15	!663669	3376	McKinley Barrier Free Park		facebook	navnal	false	Dec 3, 2019	No	No		1	50	50 USD		1	

\*\*Focus on data from the past 2 years

# Definition of Each Column (Screenshot)

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

	E	F	G	H	I	J	K	L
Name	Traffic Source	Payment Method	Date	Tribute / In-Honor	Recurring	Recurring Status	Amount	Currency
	recurring	creditcard	Sep 1, 2020	No	Yes	21 Donations	10	
	recurring	creditcard	Aug 1, 2020	No	Yes		10	
	recurring	creditcard	Jul 1, 2020	No	Yes		10	
	recurring	creditcard	Jun 1, 2020	No	Yes		10	
	recurring	creditcard	May 1, 2020	No	Yes		10	
	recurring	creditcard	Apr 1, 2020	No	Yes		10	
	recurring	creditcard	Mar 1, 2020	No	Yes		10	
	project report	creditcard	Feb 5, 2020	Yes	No		100	
	recurring	creditcard	Feb 1, 2020	No	Yes		10	
	gift card	giftcertifica	Jan 19, 2020	No	No		10	
	recurring	creditcard	Jan 1, 2020	No	Yes		10	
	gift card	giftcertifica	Dec 18, 2019	No	No		25	
	facebook	creditcard	Dec 3, 2019	No	No		200	
	facebook	paypal	Dec 3, 2019	Yes	No		50	
	facebook	creditcard	Dec 3, 2019	No	No		10	
		creditcard	Dec 3, 2019	No	No		200	
	facebook	creditcard	Dec 3, 2019	Yes	No		100	
		creditcard	Dec 3, 2019	No	No		2500	
	email	creditcard	Dec 3, 2019	No	No		50	
	facebook	creditcard	Dec 3, 2019	No	No		25	
		creditcard	Dec 3, 2019	No	No		15	
	facebook	creditcard	Dec 3, 2019	No	No		50	
	recurring	creditcard	Dec 1, 2019	No	Yes		10	

Trends/Finding	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.



JPEG, PNG, or GIF. Horizontal layout. High resolution recommended.

[http://www.facebook.com/\[Facebook Name\]](http://www.facebook.com/[Facebook Name])

**Facebook Name**

GlobalGiving

88 characters remaining

[http://www.twitter.com/\[Twitter Name\]](http://www.twitter.com/[Twitter Name])

**Twitter Name**

GlobalGiving

88 characters remaining

**Email Signup Link**

This is the direct link to subscribe to your organization's email newsletter through Mailchimp, Constant Contact, etc.

200 characters remaining

**Organization's Programs and Mission**

**HELP PROVIDE A SCHOLARSHIP FOR A GIRL  
TODAY!**

We appreciate YOU!  
Sylvester and the Develop Africa Team

Never miss a story from Develop Africa, Inc.—[subscribe to their newsletter today](#).

A woman in a purple shirt and dark shorts is bent over, working in a field of young plants. The field is filled with rows of small green plants in dark brown soil. In the background, there are taller green plants, possibly corn, and a line of trees. The sky is bright blue with scattered white clouds.

## 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 Juszcak

Google search results for "anna juszcak".

www.linkedin.com › anna-juszcak-profile

**Anna Juszcak - Program Fellow - GlobalGiving | LinkedIn**  
Anna Juszcak · Program Fellow · GlobalGiving | LinkedIn · Join nowSign in · Anna Juszcak · Chicago, Illinois · Program Fellow · GlobalGiving



**Anna Juszcak**   
Program Fellow at GlobalGiving  
Chicago, Illinois · 500+ connections · Contact info

**DePaul University**

**Education**

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

**Accomplishments**

**4 Organizations**  
DePaul Panhellenic Council · eGenius Mentor · Alpha Phi Sorority · DePaul Panhellenic Council

**2 Honors & Awards**  
Academic Excellence Kellstadt Marketing Center Scholarship Award · Dean's Award for Scholastic Excellence

**2 Languages**  
English · Polish



**Anna Juszcak**  
Program Fellow

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.

## Demographics

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

# 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?

# Bonus: Plan Your Outreach and How You will Engage with these Networks

## Diaspora

- Present to Consulates
- Join Facebook Groups
- Advertise at Museums
- Present at a LinkedIn Webinar
- Advertise at Restaurants

## Young Donors

- Join an EventBrite/MeetUp or ask to present at an event
- Do outreach on Social Media
- Partner with Podcasts
- Partner with Influencers

## Institutions

- Google a College Events Board and ask to present
- Reach out to a College News Outlet and ask to be featured
- Ask to present to a Religious Group

## Businesses

- Attend a LinkedIn webinar
- Attend a Small Business EventBrite/MeetUp and tell them the power of a partnership with a nonprofit
- Present to a Business that has a mutual benefit

# Segmentation Tools on GlobalGiving

# Project Appeals

## Donor Segmentation:

<input type="checkbox"/>	Active Monthly Donors	37
<input checked="" type="checkbox"/>	One-time Donors who have given less than \$100 (USD)	161
<input type="checkbox"/>	One-time Donors who have given \$100 (USD) or more	69
<input type="radio"/>	All of the Above	267
<input type="radio"/>	All Subscribed Users	303

Your appeal will be sent to 161 people.



This is a special appeal from **E and H Foundation** to you and other supporters on behalf of their **Educate 175 Underprivileged Children in India** project on GlobalGiving.



Dear Donorfirst,

Just like 80% of the students under our program, Priyank and Kirit 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.

# 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



Photo from IsraAid

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

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*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

[www.facebook.com](https://www.facebook.com) > ... > Charity Organization ▾

## GlobalGiving - Home | Facebook

**GlobalGiving**, Washington D. C. 116K likes. We're the largest global crowdfunding platform for grassroots charitable projects. We're the largest global crowdfunding platform for grassroots charitable projects. connecting nonprofits, donors, and companies in nearly every...

★★★★★ Rating: 4.8 - 54 votes

[en.wikipedia.org](https://en.wikipedia.org) > wiki > GlobalGiving ▾

## GlobalGiving - Wikipedia

**GlobalGiving** is 501(c)(3) non-profit organization based in the United States. It is a global crowdfunding platform for grassroots charitable projects.

**Tax ID no.:** 30-0108263

**Employees:** 57

**Location:** Washington, D.C., United States

**Founders:** Mari Kuraish

[www.charitynavigator.org](https://www.charitynavigator.org) > ... ▾

## Rating for GlobalGiving - Charity Navigator

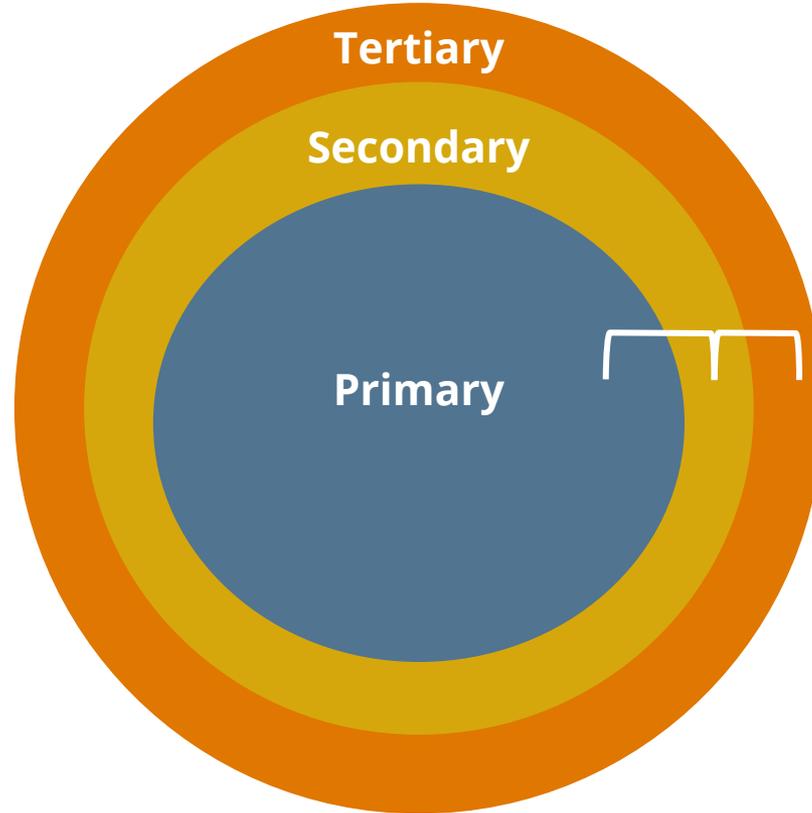
Apr 1, 2020 - **GlobalGiving** is the first and largest global crowdfunding platform for grassroots charitable projects. We're the largest global crowdfunding platform for grassroots charitable projects. vetted nonprofits, donors, and companies in nearly every ...

★★★★★ Rating: 4/4 - Review by Charity Navigator



# Fundraising Advocates

# Fundraising Advocates Build **Bridges** to Your Secondary and Tertiary Networks



# Characteristics of a Great Fundraising Advocate

1

They have a large network of friends, family, etc

2

They are passionate and positive about your cause and interested in your work

3

They know your story and can act as brand ambassadors

4

You are comfortable asking them to help

5

They have the time and willingness to work



## 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

[SIGN UP](#)

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](#)

# Create a Fundraiser

## Fundraiser Details

YOUR FUNDRAISER TITLE

YOUR NAME

FUNDRAISER PHOTO (OPTIONAL)

no file selected

FUNDRAISER URL (OPTIONAL)

globalgiving.org/fundraisers/

DESCRIPTION

FUNDRAISING GOAL (OPTIONAL)

\$

# Kris' Marathon

A fundraiser by Kris L.



**\$3,090** of \$3,500 goal

Raised by **48** donors in **3** months

\$

**DONATE NOW**

SHARE:



**COPY LINK**

## Recent Donations

- \$50** from *Daphne*  
1 month ago
- £38** from *Patrick*  
1 month ago
- \$100** from *Pamela*  
1 month ago
- \$100** from *Kate*  
1 month ago

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]**

## Dashboard

GG Rewards

Organizations

Projects

Donations

Fundraisers

Project Appeals

Reports

Disbursements

Users

Applications

Evaluations

Summary of All Time

VIEW ANALYTICS

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

GG Rewards

VIEW GG REWARDS

Rewards Status:

**Superstar**

62 points

Search Rank:

**4**

of 5,051

EARN MORE POINTS

GET BADGES

View Dashboard for

## QUICK LINKS

**Nonprofit Partner Handbook**

Your organization's complete guide to succeeding on GlobalGiving.

**GlobalGiving Insider Blog**

Check out our blog for updates on campaign information, new website features, and more!

**Visit Learn Library**

Tips, tools, and resources for nonprofits, companies, and donors making the world a better place.

**GG Commitment**

Read GlobalGiving's commitment to our nonprofit partners.

Recent Activity

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

Projects

# 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

**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.

# Major Donor Stewardship

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.

# Build Relationships

## 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

New donors  
Loyal donors  
Major donors  
Planned giving donors

	Communication type	Timeline				
Acknowledgment	Thank you email or call	Within 24 hours	✓	✓	✓	✓
	Thank you call from director	Within 48 hours			✓	
	Welcome letter	First week	✓			
Recognition	Annual donor lunch invite	Annually		✓	✓	✓
	Annual report listing	Annually			✓	✓
	Legacy society invitation	First month				✓
	Donor highlight in newsletter	Annually			✓	
Reporting	Video update of impact	Quarterly	✓	✓	✓	✓
	Impact report	Quarterly	✓	✓	✓	✓
	Update on gift use	Twice a year			✓	
Ongoing engagement	Volunteer opportunity	Quarterly	✓	✓	✓	✓
	Donor survey	Quarterly	✓	✓	✓	✓
	Holiday cards	November	✓	✓	✓	✓
	Donor summaries for taxes	Annually	✓	✓	✓	✓
	Gala invitation	Annually			✓	✓
	Donor anniversary	Annually	✓	✓	✓	✓
	Donor stories	Quarterly	✓	✓	✓	✓

## 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

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

CURRENT DONORS (WHO GAVE IN LAST TWO YEARS)								
JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
Happy New Year Email w/ updates on your goals for new year	Plan newsletter & solicitation	Quarterly Newsletter	Board writes thank you notes at meeting	Plan newsletter and impact report, begin annual report	Quarterly Newsletter	Donor Impact Report (email or infographic)	Board writes thank you notes at meeting	Quarterly Newsletter
			Spring Solicitation					Fall Solicitation

# Thank you!

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**Atlas Corps**

# Fellowship | Virtual Institute



**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? | When? | How? | Who?



- **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

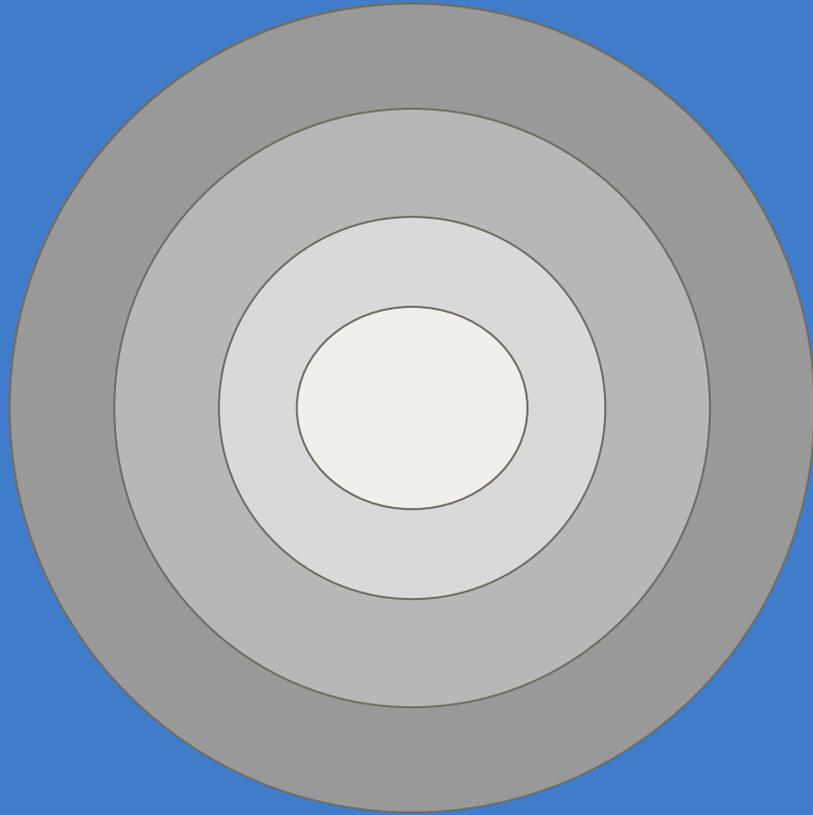
# How to cultivate relationships?

- **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](mailto:abby@atlascorps.org) | [www.atlascorps.org](http://www.atlascorps.org)



A young girl wearing a red traditional hat and a red patterned shawl stands in a greenhouse, holding a large green vegetable. The background shows the curved structure of the greenhouse and other plants. The word "Questions?" is overlaid in white text.

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](mailto:oswaldoalvizar@globalgiving.org)

Mexico & Latin America Partnerships Consultant.

He's great.

**Please fill in this quick poll :)**

It should be launching... now

# 24/09 Next Session: Messaging your Mission With Confidence

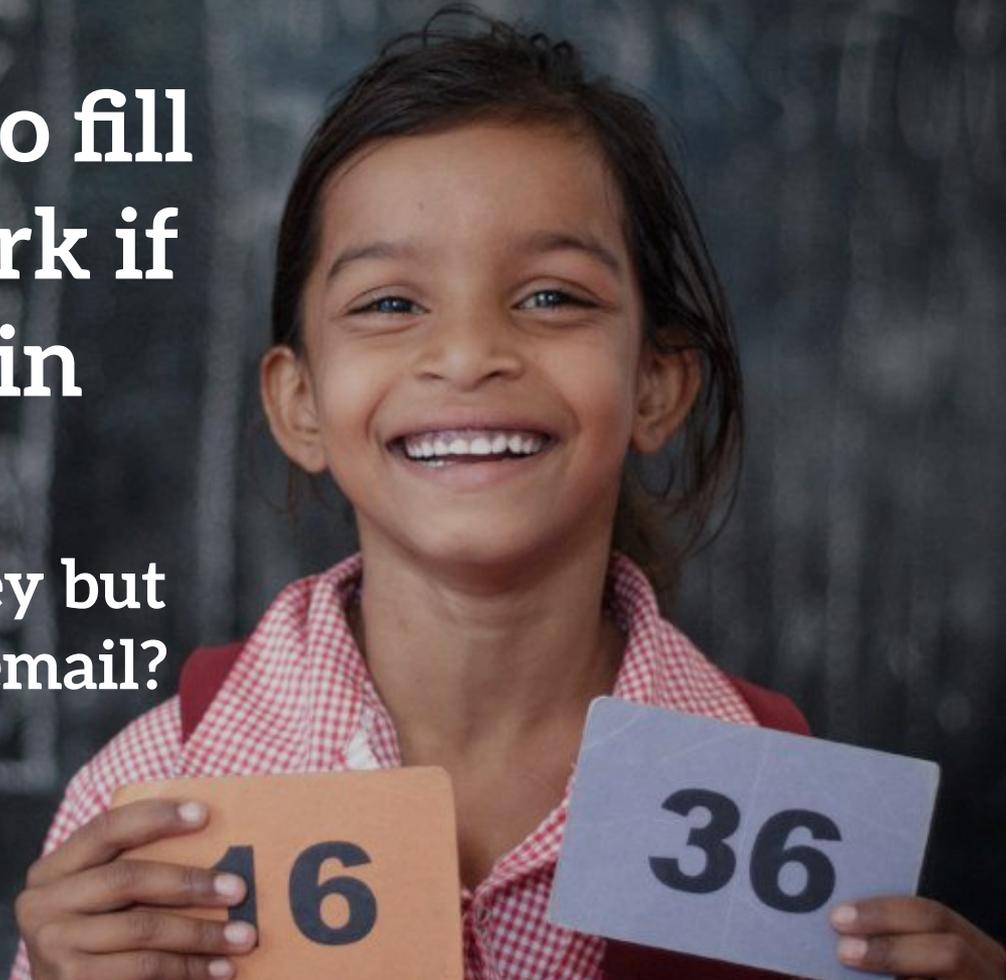
Next week at the same time (9 AM ET), we'll discuss effective boilerplate messaging, bring in the world of digital marketing to discuss A/B testing and Google Ads

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**



A large mural on a wooden wall featuring two faces, one above the other, with intricate patterns and colors. Three children are seen from behind, looking at the mural.

thank you

