

GiveGab[®]

Nonprofit Giving Platform

Donor Stewardship Best Practices

www.GiveGab.com



What is Donor Stewardship?

- **Stewardship** - The process of having meaningful interactions with supporters to create long-term engagement and investment
- The stewardship process ensures that each donor is properly thanked, appreciated, and recognized when and where appropriate
- Your stewardship plan may be different for different sets of donors, and can include:
 - Sending thank you messages (via email or a handwritten note)
 - Offering special gifts and rewards for repeat donors or those who have repeatedly attended your events (works great for annual events)
 - Publicly recognizing donors at events or on social media, with advance permission
 - Providing content that shows how donors' gifts are being used and who is being helped by your organization



Why is it Important?

- Helps you connect with donors old and new and continue building positive relationships with them
- Establishes a base of loyal supporters who will continue to make important contributions to your organization
- Allows your supporters to feel cared for and to look forward to engaging with you in the future

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Strategies for Success

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Strategies for Stewardship Success

1. Send a Timely & Personal Thank You
2. Make Use of Campaign Status Updates
3. Organize Your Supporter Data & Segment Your Donors
4. Show Your Donors the Importance of Their Gifts



Strategy #1: Customize Your Thank You

- GiveGab allows you to create a customized thank you message that will **automatically** be sent to your donors *immediately* when they make a contribution to your organization, campaign, or event
- You have the option to include your own text, a link to your website, and either a custom image or video in your thank you message
- This message is one of the most important tools you can use to begin the stewardship process!



Strategy #1: Customize Your Thank You

- A heartfelt thank you leads to better stewardship by helping your donors feel recognized, important, and appreciated
- 80% of donors report that receiving a timely and meaningful thank you would sway them to donate again
- A plan for retaining your current donors is key to long-term success, and is inexpensive to implement



Example: Campaign Thank you

- This thank you message does a great job of highlighting ways donors can stay up to date on the progress of the animals they are supporting with their gifts

Thank You Message

Thank you SO MUCH for helping VINE to welcome the Green Mountain Mix Mob to the sanctuary. Please do sign up for our newsletter and/or follow us on Facebook, so that you can follow these remarkable goats and sheep get along as they acclimate themselves to sanctuary life. We can tell already that their dual-species flock is going to be a very special part of our multi-species community!

Sincerely,
your pals at VINE Sanctuary

Thank You Video

Paste Youtube or Vimeo Link Here

Tip: Creating a unique thank you video helps show your supporters how special they are.

Thank You Image



Tip: Don't have a video to link to? Upload an image!

Select Image

Remove



Tips for Thanking Your Donors

- Make sure that they are thanked in a timely manner
 - GiveGab makes it easy to thank your online donors with a custom thank you email
 - Another, more personalized thank you can be sent at a later date, but don't wait months!
- Make it personal
 - Consider a handwritten note, or for major donors, a personalized thank you gift
- Be specific about the impact of the donor's contribution
 - When you thank each donor, include an acknowledgement of what their gift helped you to accomplish with photos or a description
- Include additional opportunities to get involved
 - *Example:* "Join us on Sunday for our Summer BBQ Jamboree"



Strategy #2: Make Use of Status Updates

- Provide immediate updates to your supporters
 - Keep your supporters in the loop about your campaign's progress
 - Share reminders of important details ahead of events
- Show your donors your appreciation with status updates
 - Recognize major donors or sponsors (with their permission)
 - Send them an additional thank you after the campaign has ended
- Recognize Donor Impact
 - Share visuals of what your donors have helped you achieve
 - Updates can be created at any time to make campaign follow up a breeze



Campaign Status Updates on GiveGab



General Info



Tell Your Story



Custom Thank You



Status Updates



Matching



Donation Levels



Fundraisers

Status Updates

Let your donors know how your campaign is going or what you have done with their contribution. Updates are a great way to build a relationship with your supporters!

When you Save your update, your supporters will be notified by email. Status updates will also appear on your campaign next to your story so new supporters won't miss out.

Add Status Update



Almost there!

July 3, 2018

Edit Delete

Here's a STATUS UPDATE!

January 24, 2018

Edit Delete



Example

Update

October 14, 2016



Wow! We are just shy of reaching a third of our \$15,000 goal in the first week of our *Take a Walk on the Wet Side* campaign! First off, we wanted to say thank you for joining us on this important project; we are so grateful for your support and encouragement. Secondly, we hope you will take a few minutes to share this campaign with your networks -- the more the merrier as they say! Be sure to stay tuned for updates as we continue our fundraising efforts. Trails are in the process of being cleared, and we are closer to our goal of building the much-needed infrastructure on this beautiful preserve (thanks to you!)

With gratitude,

The Finger Lakes Museum & Aquarium Team

Swift gratitude

October 21, 2016



Our hearts are bursting with gratitude for the Swift Charitable Foundation, who recently made a \$1,000 contribution to *Take a Walk on the Wet Side*. Each day, we grow closer to our goal, thanks to donors like you (and you, and you!)

Sincerely,

The Finger Lakes Museum & Aquarium Team

P.S. We hope that you will take a few moments to share this campaign with those closest to you.

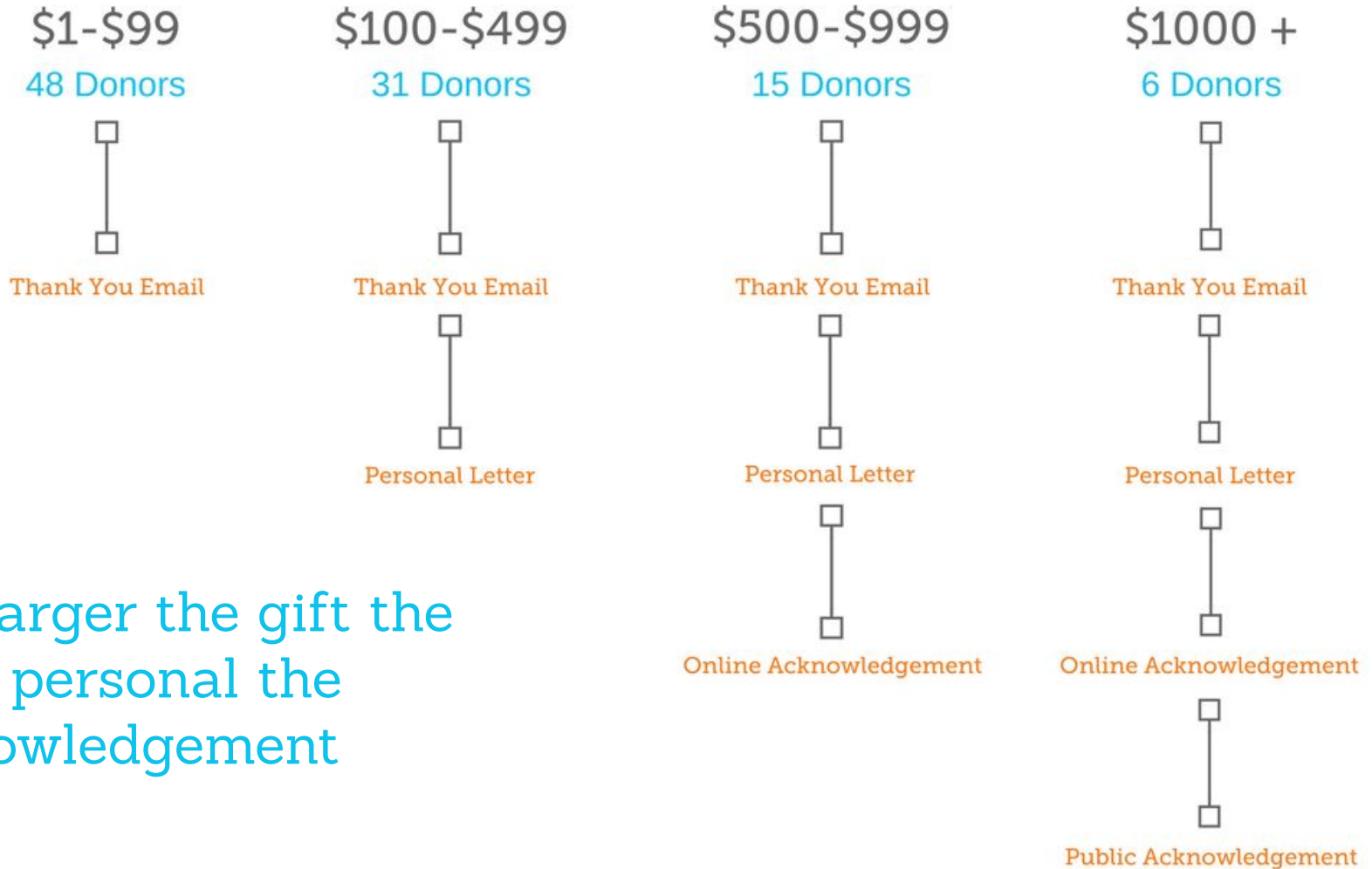


Strategy #3: Personalize Stewardship

- Every donor is important, but not necessarily equal
- Determine your donor segments
 - By Giving Level
 - By Entry Point
 - By Giving History
- Create a realistic strategy to thank all of your donors appropriately based on their segment and potential relationship with your organization
- Utilize the data you have on hand from GiveGab for ideas!



Segmenting Example



The larger the gift the more personal the acknowledgement



Leveraging Donor Data for Stewardship

- You can use GiveGab to collect important information about your donors
 - Name and email address
 - Phone number and mailing address
 - Complete donation history, including donation amounts & any recurring donations
 - Fundraising history
 - Has this person created a personal Peer-to-Peer fundraising page to help fundraise for you?
 - Volunteer history
- On the [Boost](#) plan, you also have the ability to use custom tags & notes to help you segment your donors and easily search your donor base



Enhanced Supporter Engagement Profiles

On the **Boost** plan, you have the option to create **custom properties**, such as birthday, T-shirt size, or any other info you might want to store about each donor, and **custom tags**, which allow you to easily group and search for donors.

For example, you could create a “fundraiser” tag to easily see all of the donors who have fundraised for you and send them a special thank you.

Bridget Cafaro
Joined on 9/6/2016 Remove
Admin Change
5.0 Volunteer Hours
\$1,700.00 Donated Total

Bridget's GiveGab Info
Email: bridget.cafaro@givegab.com
Phone: 84558488848
Mailing Address: 123 Main Street, Ithaca, New York 14850, United States
Privacy: Visible
Contact Information: Edit
Email: Edit
Phone: Edit
Mailing Address: Edit
Custom Properties: Manage
How do you prefer to be contacted?: Edit
Email: Edit
Birthday: 4/4/2017 12:00 am Edit
T-shirt Size: M Edit
Eye color: Hazel Edit
Shoe size: 8 Edit

Tags
+ Add Tag
#givingtuesday donor, 2016 volunteer, adopted a pet, april birthday, gives in dec, mailer, parents donate, rotary

Notes
+ Add Note
Created by: Bridget Cafaro on 4/19/2017
Adopted Senior Dog Mt. Pickles on 7/7/16

Donation History Record New Gift

Date	Amount	Campaign	Anonymous	Covered Fees	Recurring	Type
4/28/2017	\$100.00	Save A Senior Dog!	No	No	No	Offline
4/19/2017	\$500.00	2016 Dog Walkathon & 5K!	No	Yes	No	Online
3/16/2017	\$100.00	Logan's Bones	Yes	Yes	No	Online
3/16/2017	\$100.00	Save A Senior Dog!	Yes	Yes	No	Online
3/16/2017	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
3/15/2017	\$100.00	Save A Senior Dog!	Yes	Yes	No	Online
3/15/2017	\$50.00	#GivingTuesday on GiveGab	No	Yes	No	Online
3/15/2017	\$100.00	Save A Senior Dog!	No	Yes	No	Online
1/17/2017	\$40.00	Logan's Bones	No	Yes	No	Online
12/19/2016	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
11/22/2016	\$100.00	Logan's Bones	No	Yes	No	Online
11/18/2016	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
11/2/2016	\$100.00	Logan's Bones	No	Yes	No	Online
9/6/2016	\$100.00		No	Yes	No	Online
9/6/2016	\$10.00		No	Yes	No	Online

Volunteer History

Date	Hours	Opportunity	Task
1/5/2017	3.0	Gift Wrap Bones for the Holidays!	
11/19/2016	2.0	Dog Food Drive!	

Fundraising History

Campaign	Amount Raised	Goal	% Complete	Num Donations
2016 Dog Walkathon & 5K!	\$500.00	\$500.00	100%	1
Logan's Bones	\$100.00	\$500.00	20%	1



Strategy #3: Personalize Stewardship

- Segmenting your donors is a crucial component of the stewardship process
 - Helps identify who your donors are and what types of communication and appeals they will respond to best
 - Gives you the ability to send more personalized thank you messages and gifts
 - Allows you to effectively focus donors' attention on future events they will be most interested in
- Start small and work your way up!
 - Depending on your capacity, start with 2-3 groups and try as you go
 - New Donors and Repeat Donors
 - Major Donors (Over \$500) and Small Donors (Less than \$500)
 - Direct Referrals and P2P Fundraiser Referrals



Strategy #4: Highlight Donor Value

- Invite someone who has been helped by your organization to speak at an event
 - Show your supporters how they affect the lives of the people you serve
- Create visual content that displays what you have been able to achieve because of your donors and volunteers
 - Photos from a recent volunteer outing or a video of your last event
 - Infographics that break down your direct impact to the people you serve
- Connect the gift amount with a specific need that it met
 - Example: Your gift of \$20 provided a child with a new textbook for the school year



How to Highlight Donor Value on GiveGab

- GiveGab makes it easy to show your donors what their gifts have allowed you to do and what makes your organization great!
- Use status updates or custom thank you messages to follow up with your donors and show them the progress you have made with their help
- Create a video from your event and post it on your GiveGab page or share it out to your supporters after the event is over to remind everyone of those relationships that were formed and the goals that were achieved



Acknowledging Your Donors

Successful Acknowledgement Checklist

- Have your donors received a timely acknowledgement of their gift?
- Have your donors been thanked more than once for their contribution?
- Have you demonstrated how their funds are being utilized?
- Have you recognized your donor appropriately in accordance with their gift size and current donor segment?



Key Takeaways

- A customized & personal thank you message is a heartfelt way to show your appreciation
- Status updates are an opportunity to keep supporters updated on the progress you have achieved together & encourages them to grow their relationship with you
- Segmenting your donors helps you easily organize supporters & determine the best ways to acknowledge them
- Donors feel appreciated when you highlight what their contributions have helped you accomplish

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Thank You!

Have questions? Email us at customersuccess@givegab.com

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