

Donor Stewardship During a Pandemic

TEFN Connect Webinar and Interactive Learning Series
August 12, 2021



Rachel Muir
Founder, Girlstart



Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- What Rachel does: online workshops & classes, custom training, board retreats

Weaknesses: chips, queso




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www.rachelmuir.com



A close-up, high-angle photograph of a person's hand typing on a black laptop keyboard. The hand is positioned over the keyboard, with fingers pressing keys. The background is a wooden desk. In the top left corner, there is a black mug with a white rim and a green book. The overall image has a dark, muted color palette with a blue overlay.

**Speaker, trainer and nationally
recognized non profit founder and
thought leader.**

[GET TO KNOW RACHEL](#)

Today's slides -> www.rachelmuir.com/handouts

Today's guide:
www.rachelmuir.com/virtual

How to Steward & Cultivate Donors in a Virtual World



Rachel
MUIR

Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Set up Google alert, Twitter and Google+ follow, add on LinkedIn	Set up	Development Director	Immediate	✓		
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director	48 hours	✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
Thank-you letter from ED with tax info on letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter: "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
Short online survey with five questions to get to know their interests	Create and send	Development Director	Three months	✓		
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
Internal memo from ED with insider view	Write and send	CEO	Quarterly		✓	✓
Invite to donor focus group	Plan and organize	Development Director	Annual			✓
Card and call on anniversary of first gift "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual			
Thanksgiving thank-you call	Pull list and call	Development Director	Annual			
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual			
Personal note on annual report	Write	CEO	Annual			

www.rachelmuir.com/stewardship

Pep talk:
How to
fundraise in a
crisis

Winning
donor
stewardship

Virtual
tools to
delight
donors

Thank you
checklist
guide

Q&A

Donor Stewardship During a Pandemic



“There is no “perfect moment” to raise money. Difficult times emphasize the urgency and drama of compelling needs.”

Jerry Panas



@rachelmuir



Facebook.com/RachelMuirFundraising

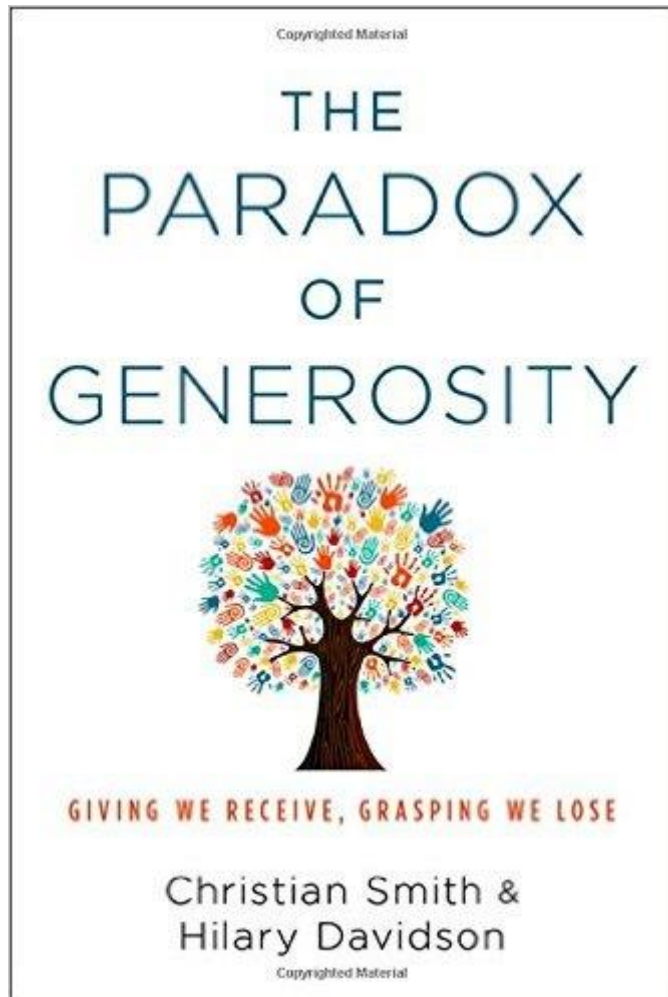


GIVING = WINNING THE LOTTERY

Donors are 43% more likely to say they are “very happy” than non-donors



Health impact



Studied 2,000 people over 5 years

More generous you are, the happier & healthier

Lower rates of depression

Lower blood pressure

Increased feelings of self worth

The world is full of
generous people
who want to give

You're just trying to help
and make the world a
better place

Fundraising Truths

Giving is a joyous
experience that feels
good to the donor

Being asked makes
donors feel
important

Fundraising Pep Talk

Giving combats feeling helplessness

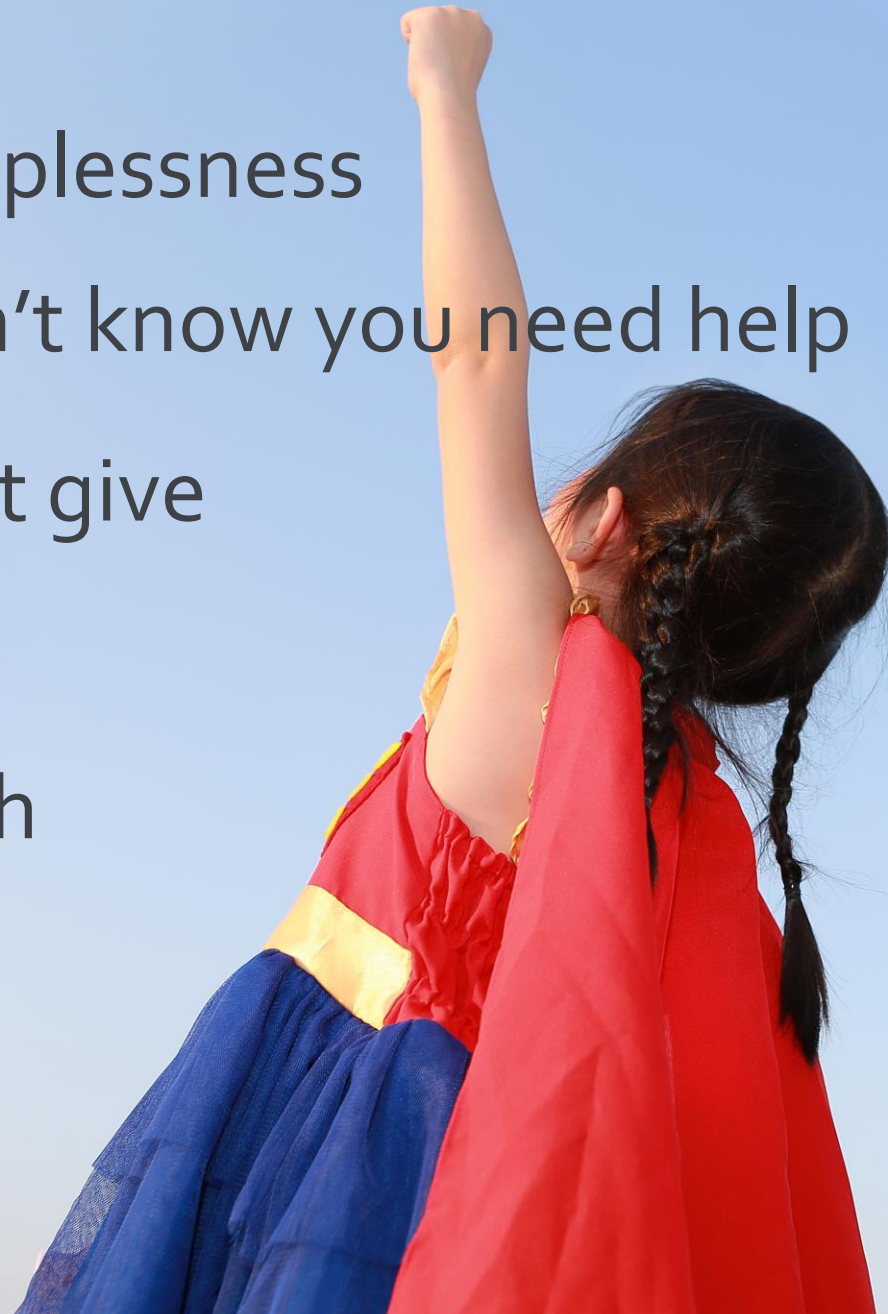
If you don't ask people don't know you need help

Don't assume donors won't give

People want to help

Helping others is not selfish

It feels good to give



Rachel Muir's Virtual Tools to Delight, Stand Out & Know if Your Message is Getting Through



RachelMuir.com/virtual

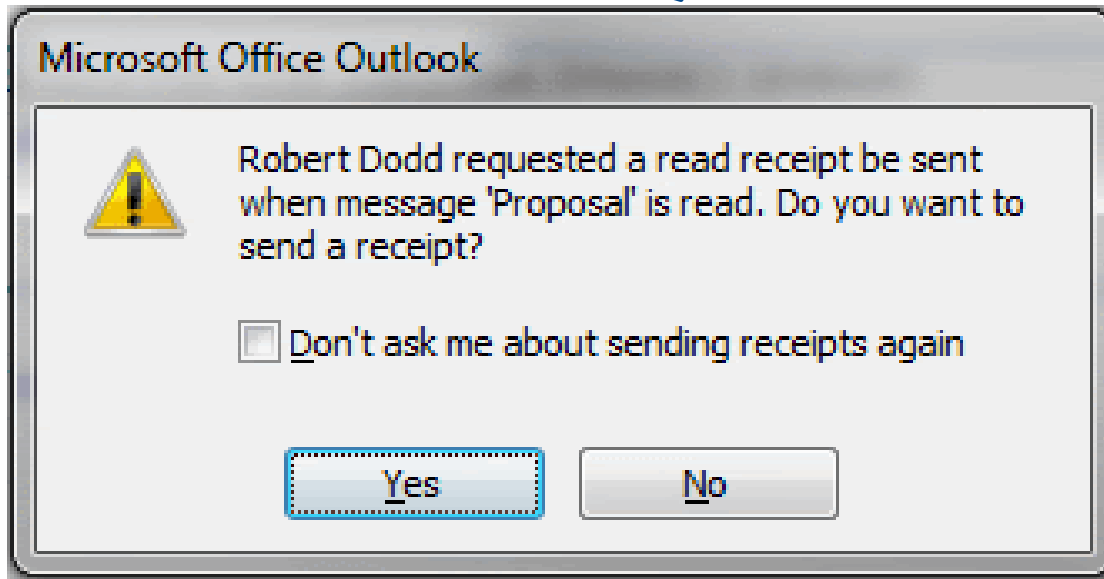
How to Steward & Cultivate Donors in a Virtual World



Rachel
MUIR

Wish you knew if your donor read your email?

But not like this...



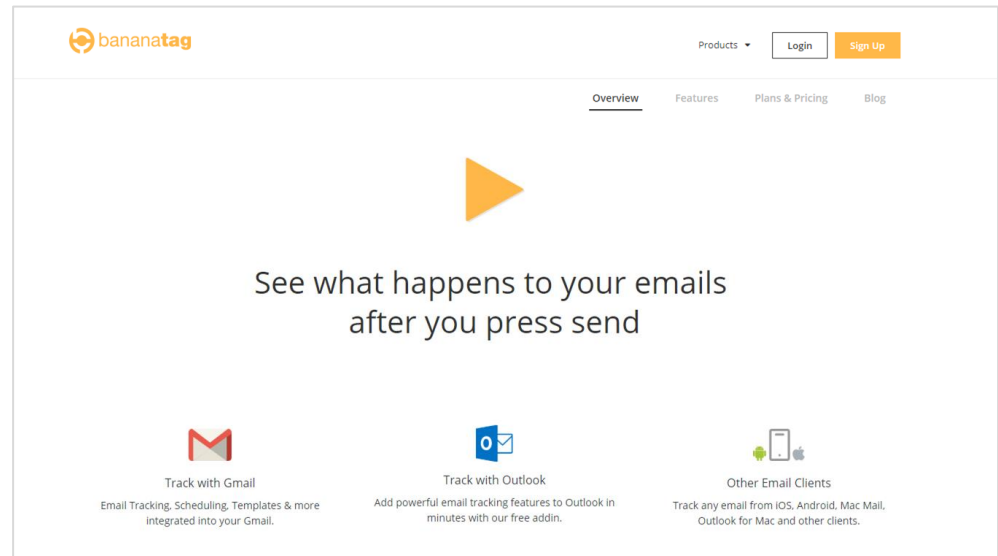
Yes or No

Track for free (5 a day)

Track.Bananatag.com



- Show you when your emails are opened
- Sends you notifications when a contact opens your email (or clicks a link)
- (No one knows you're doing it)
- Track 5 a day for FREE



Get the list of tools at www.rachelmuir.com/virtual

How can I stand out in a busy inbox?



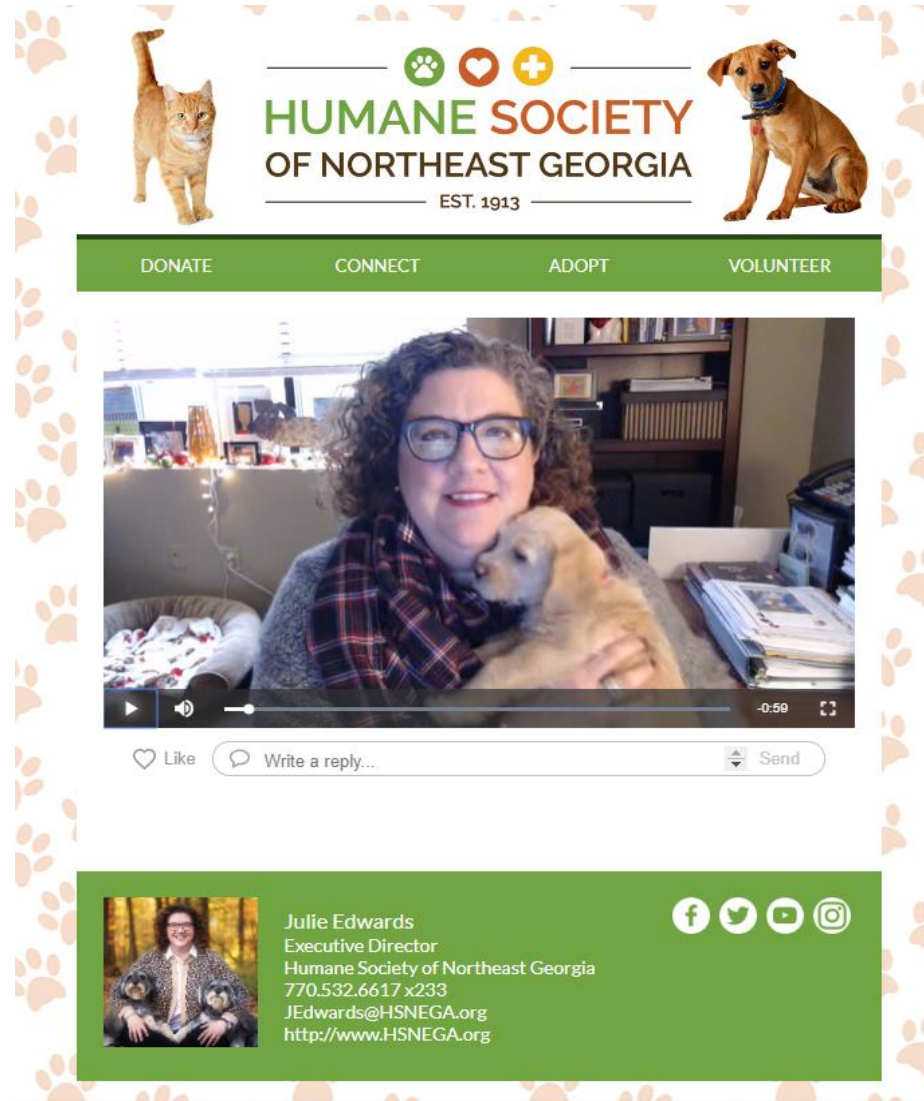
Video email

- www.BombBomb.com
- Record videos straight from your inbox or phone
- Send from Gmail or Outlook (Or use branded custom email stationery)
- Tracks opens
- Custom email header

bit.ly/SampleVideoThanks

**Get the Guide to Virtual Cultivation
(and a sample video email from me!)**

www.rachelmuir.com/virtual

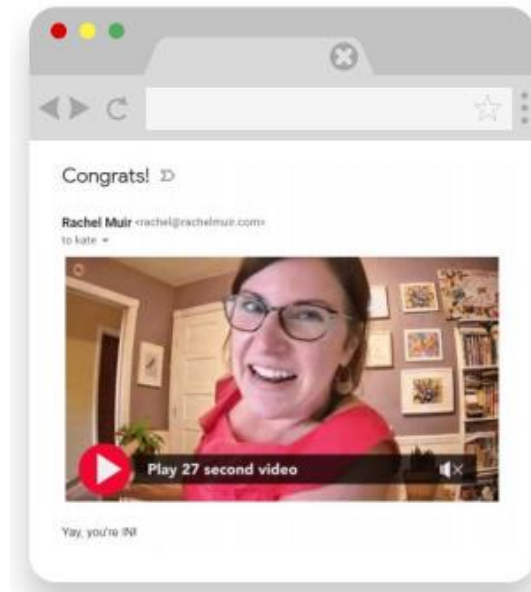


Bomb Bomb Video Email

go.bombbomb.com/udCxy

Nonprofits get FREE
lifetime accounts!

Value? \$470/year



bit.ly/SampleVideoThanks



@rachelmuir



Dear Julie,

I want you to know how especially thankful I am that you chose to make your gift NOW.

Julie, the fact that in a time that is so worrying and stressful for EVERYONE you chose to think about others speaks VOLUMES about who you are.

I also want to just reach out to you and make sure you're staying safe right now.

I'm here if we want to have a quick chat. Here's my calendar ->
www.calendly.com/rachelmuir

Get notified when video is watched

<input type="checkbox"/>	☆	»	BombBomb 3	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	Jan 10
<input type="checkbox"/>	☆	»	Rachel, Heather 4	Inbox	Welcome back!!! - finalizing with Cascades and am happy to follow up with PeaceHealth after that gets wrapped up. I'm happy t...	Jan 10
<input checked="" type="checkbox"/>	☆	»	BombBomb 5	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	Jan 8
<input checked="" type="checkbox"/>	☆	»	BombBomb	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/20/19
<input checked="" type="checkbox"/>	☆	»	BombBomb 3	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/19/19
<input type="checkbox"/>	☆	»	Alicia Berruti	Inbox	Your Webinar Recording - S. Cascade Ave #700, Colorado Springs, CO 80903 This email was sent to rachel@rachelmuir.com. If...	12/18/19
<input type="checkbox"/>	☆	»	Ethan at BombBomb	Inbox	5 different gratitude messages you can send today. - S. Cascade Ave #700, Colorado Springs, CO 80903 This email was sent to ...	12/16/19
<input type="checkbox"/>	☆	»	Ethan at BombBomb	Inbox	Your definitive guide <input type="checkbox"/> to simple videos - plus limited-time bonuses - Rehumanize Your Business How Personal Videos Acce...	12/14/19
<input checked="" type="checkbox"/>	☆	»	BombBomb 12	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/13/19
<input type="checkbox"/>	☆	»	Womenspace .. Rachel 8	Inbox	I'm grateful for you - training for Cascades Raptor > Center. Heather is out of town until late next week but I'm going to see > if I...	12/12/19
<input checked="" type="checkbox"/>	☆	»	BombBomb 31	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/11/19
<input type="checkbox"/>	☆	»	Alicia Berruti	Inbox	5 Gratitude Videos to Send for More Meaningful Business - S. Cascade Ave #700, Colorado Springs, CO 80903 This email was ...	12/9/19
<input checked="" type="checkbox"/>	☆	»	BombBomb 5	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/8/19

Download free guide: www.rachelmuir.com/virtual



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www.rachelmuir.com

Post gala behind the scenes thanks

Kellie Trenkle ktrenkle@genevaroseburg.com via genevaacademyroseburg.onmicrosoft.com

May 1 (1 day ago) ☆

to [v]

Good evening, Geneva Hero!

A quick note to say **THANK YOU SO MUCH** for your invaluable generosity at our [2018 Growing Tomorrow's Leaders Gala](#)! Pretty INCREDIBLE (and I don't mean Hulk ~ although there were plenty of those Sat night!) what a room full of folks like you can do on one super-powered night for these kids! Thank you so much for your part in their Journey! It's Worth It!

Have to tell you this, too...

Did a little math over the weekend and tallied the total \$\$\$ that your gifts generated, sooooo I went to campus first thing this morning to capture YOUR direct impact on these sweet kiddos! You've got to see their faces when Mr. Turner announces it! Check 'em out in this video (and hear that number yourself)!



Ever texted a donor?



Yes or No



@rachelmuir

www.rachelmuir.com

21st century phone calls -> texting

Text Message
Today 8:36 AM



Hi Rachel, Your gift is giving Charlie dignity, hope and the chance to live independently. Thank you.



Hi Rachel, Happy Anniversary! One year ago you made your first gift and helped save Sunny's litter of 8 puppies.



John, thanks to you Sunny is living out her best life chasing balls at the dog park with her foster mom.

Excellent tool for
stewardship

Why Text Donors? (for stewardship!)

- Open rates average 98%
- #1 most popular feature on smart phone
- New iOS feature “Silence Unknown Callers”
- 95% of texts from businesses read within 3 minutes
- 8x’s more likely to get response than voicemail or email
- 86% of people over 50 connect through text
- 94% of seniors (70 & up) send text messages weekly

Today 8:16 AM



Hi Mark, it's Lindsay from Audubon sending a little bird therapy your way! I'm thinking of you in this difficult time. How are you doing?



@rachelmuir

www.rachelmuir.com

Textology.co

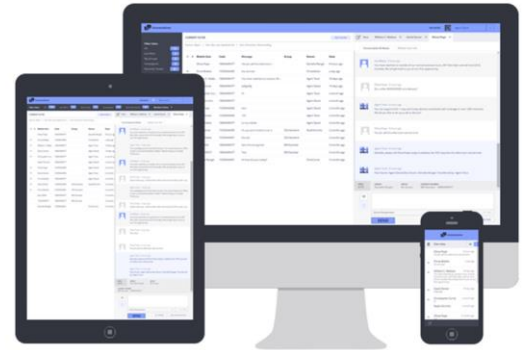
- Replies go to your inbox and you can answer them there as a text reply
- Upload a list, it identifies mobile vs landline
- Copy and paste
- Perfect for stewardship, invites, & reminders!
- Get a free 30-day trial



@rachelmuir

Textology

Respond to texts from
**any computer, phone or tablet... and
even your email.**



www.rachelmuir.com

What makes donors KEEP giving?



@rachelmuir



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Communications Content that Influences Future Giving

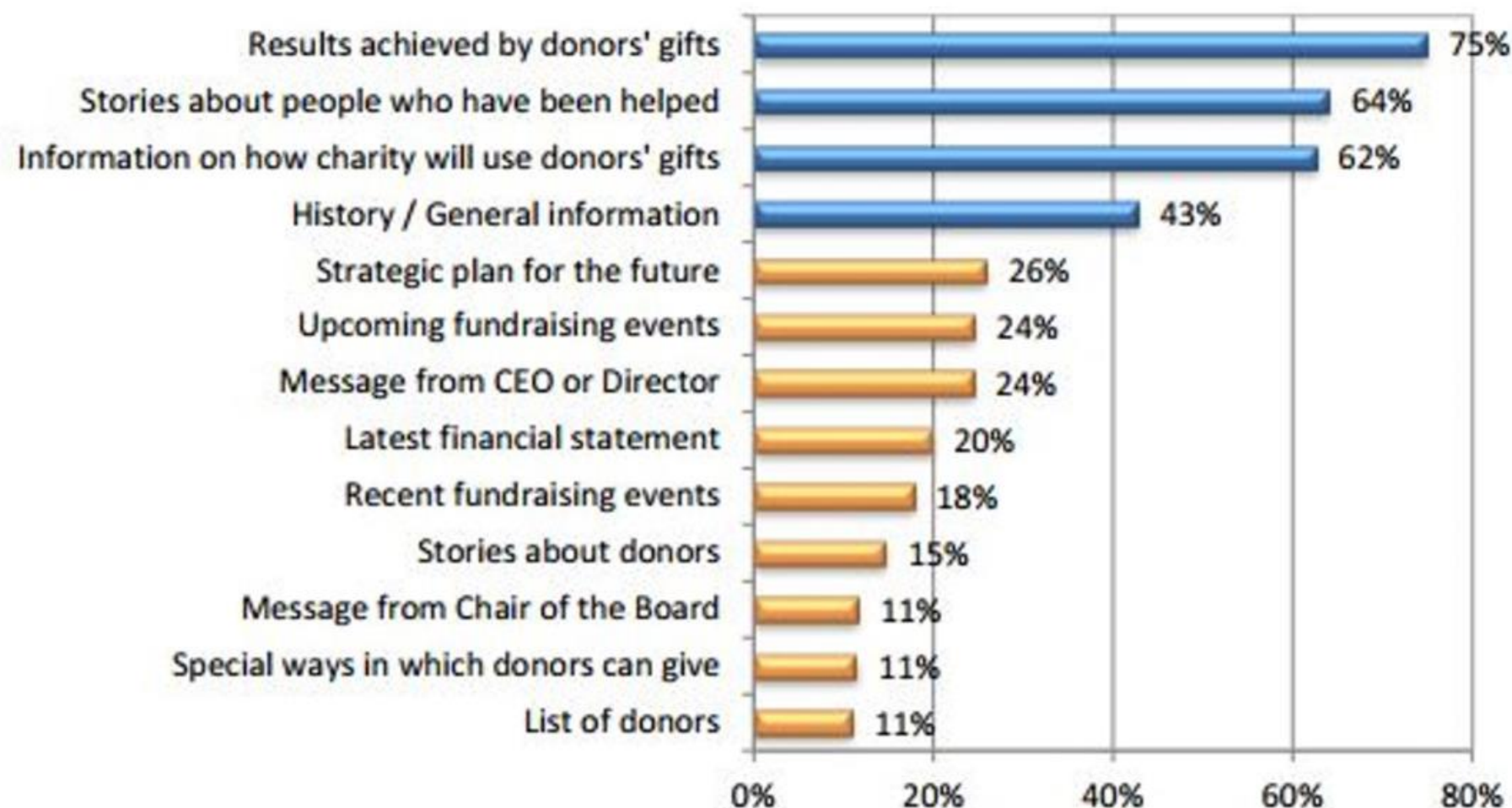


Figure 30: How Communications Content Influences Gift Renewal

“More than 80% of donors say they were never told the outcome of their gift.”



Source: Lynne Wester, [The 4 Pillars of the Donor Experience](#)



“

It's not the frequency of the ask that's the issue;
the problem is asking supporters to give again
when you have not told them what you did
with their last donation.

Casey Keller, GiveGab



@rachelmuir

www.rachelmuir.com

Do not do this.

Stewardship for Grantors	\$1-499	\$500-999	\$1,000-4,999	\$5,000-9,999	\$10,000-19,999	\$20,000-49,999	\$50,000-99,999	\$100,000+
Acknowledgement Letter	x	x	x	x	x	x	x	x
Listed in Newsletter	X	X	X	X	X	X	X	X
Receive Newsletter	x	x	x	x	x	x	x	x
Added to eblasts if email address is available	x	x	x	x	x	x	x	x
Listed in Annual Report		x	x	x	x	x	x	x
Receive Annual Report			x	x	x	x	x	x
Press Release				x	x	x	x	x
Logo displayed on website and program materials				x	x	x	x	x
Personal thank you note from grants manager				x	x	x	x	x
Personal thank you note from VP RD					x	x	x	x
Receive Outcomes Report					x	x	x	x
Event Invite						x	x	x
Phone call from President or Board Member							x	x
Board Visit								x
Special Stewardship as appropriate								x

If you treat donors based on gift amounts (not behavior patterns or actions) you'll lose money and donors.



Do you water a tree by the leaves or root?

Transaction
(in past)



Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Set up Google alert, Twitter and Google+ follow, add on LinkedIn	Set up	Development Director	Immediate	✓		
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Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
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Invite to donor focus group	Plan and organize	Development Director	Annual			✓
Card and call on anniversary of first gift "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual			
Thanksgiving thank-you call	Pull list and call	Development Director	Annual			
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual			
Personal note on annual report	Write	CEO	Annual			

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Tell us more about you...



What kind of post-gift communication do you give donors?

Give yourself 1 point for each you regularly send.

- Email thank you autoresponder
- Thank you letter
- Handwritten thank you card
- Phone call
- Text message thanking them
- Video email thanking them
- A letter (after the thank you) reporting back on the outcome of their gift
- If new, a new donor welcome letter (or kit)
- Invite for a get-to-know-you donor survey
- Behind the scenes invite: virtual tour/meet up, telephone town hall, virtual coffee with CEO, etc

Type your # into the chat

“

It is the actions of the nonprofit that cause the good (or poor) donor attitude i.e. higher giving, retention & lifetime value.

Roger Craver, Retention Fundraising



@rachelmuir



Facebook.com/RachelMuirFundraising

Will this REALLY raise me more \$?



Take these stats
to your boss or
board!

Stewardship test 50,000 donors

Test A: 25,000 donors

- Received extra thank you at beginning of the year.
- Simple expression of gratitude for past generosity (no ask or reply device included).

Test B: 25,000 donors

- Did NOT get extra thanks.

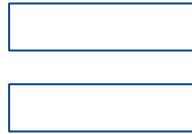
12 months later...

Both groups gave the same NUMBER of gifts.

Group that got extra thank you?

Gave total of \$450,000 MORE that year.

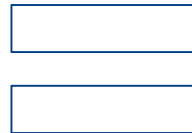
**1st time donors
getting personal
thank you call in
48 hours**



4X

**More likely
to give
again**

**Thanking in 48
hours**



400%

improvement



@rachelmuir

The goal: 1st gift -> 2nd/3rd -> monthly

AVERAGE

46%



FIRST-TIME

23%



REPEAT

60%



MONTHLY

90%



You ask. You thank. You report back.

A blue callout box with a triangular pointer pointing upwards towards the main title.

The part you care
about

A green callout box with two triangular pointers pointing upwards towards the main title.

The parts your
donors care about

Thanking + reporting back = your hugs



Steal this!



“You made your gift just one (week, month) ago and already you’ve... (insert amazing accomplishment here)”

Steal this!

“I thought you’d like to see what your support made possible”

sendagirltocamp.org



Future Veterinarian



Current Veterinarian

#WeAreGirlstart

The Do's and Don'ts of Thanking Donors



www.rachelmuir.com/thankyou

Rachel
MUIR



Questions?

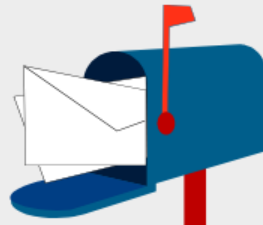
Want monthly training with Rachel?

**Build a Major
Gifts Program**



August

**End of Year
Fundraising**



September

**Copywriting
Clinic**



October

www.leagueofextraordinaryfundraisers.com

Thank you!



Follow me
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Today's goodies:

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rachel@rachelmuir.com

www.rachelmuir.com

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Virtual donor cultivation: www.rachelmuir.com/virtual