

DONOR STEWARDSHIP

AFP Program

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Donor Stewardship is all about relationships - it starts with a gift and continues on throughout the lifetime of that donor and beyond. How do you develop a plan for this? What will a good plan accomplish? How do you connect with online donors and cultivate them?

STEWARD/SHIP

A person who looks after the passengers on a ship, aircraft, or train and brings them meals.

A person employed to manage another's property, especially a large house or estate.

The job of supervising or taking care of something, such as an organization or property.

'responsible stewardship of our public lands'

WHY??????

- Improve your donor retention rate
- Encourage donors to give more
- Build a meaningful community
- Cost effective

STAGES of DONOR STEWARDSHIP

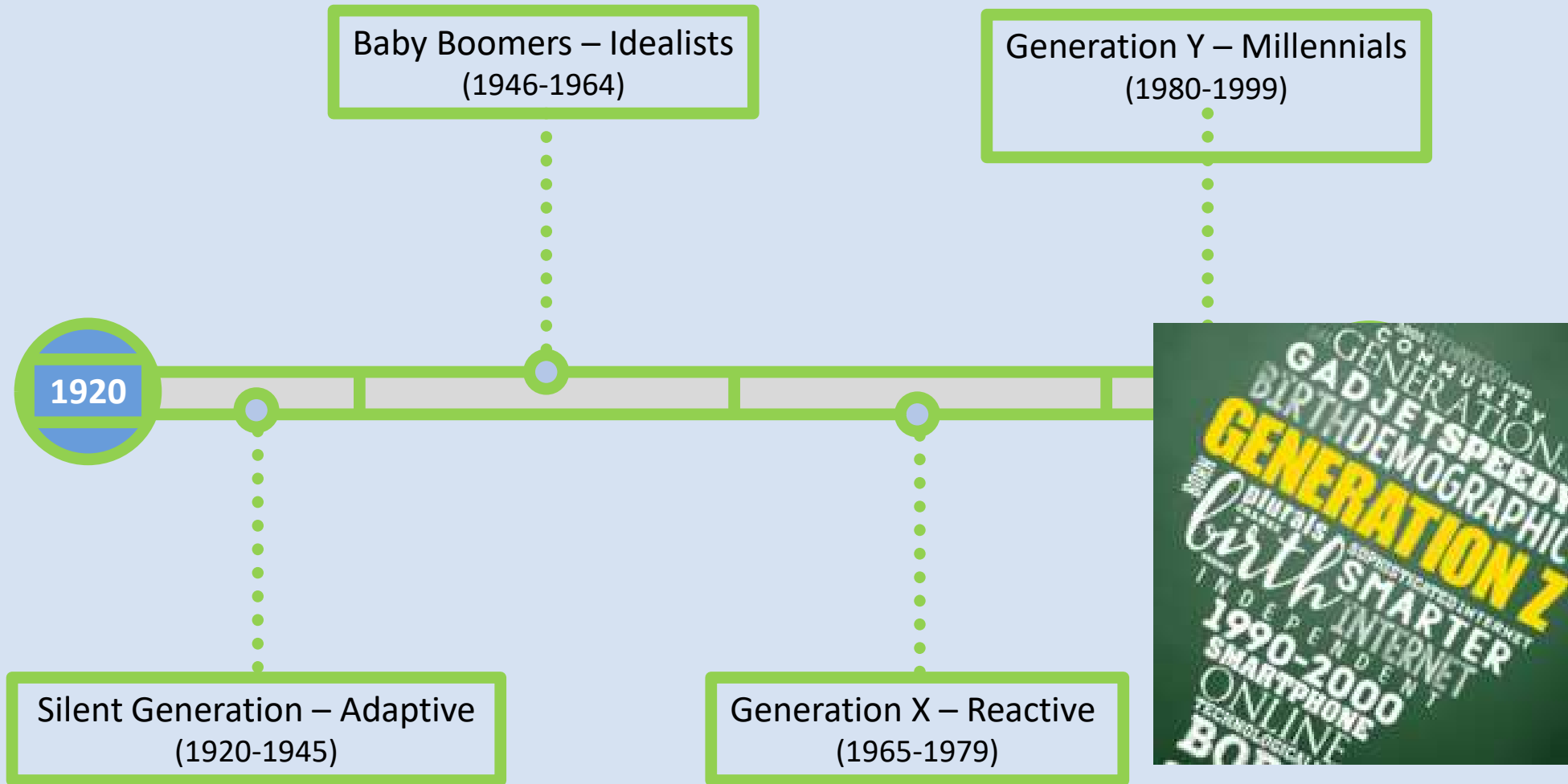
1. Gift Acceptance
2. Acknowledgment
3. Recognition
4. Communicating Results
5. Cultivation - Engagement

BUILDING A STEWARDSHIP PLAN

- Form a donor stewardship planning team
- Segment your donors into categories or levels
- Develop engagement opportunities
- Develop recognition plan
- Create stewardship matrix
- Evaluate your plan and implement feedback

Donor Stewardship Matrix			New donors	Loyal Donors	Major Donors	Planned Giving Donors		
	Communication Type	Timeline						
Acknowledgment	Thank you email/call	24 hours	x	x	x	x		
	Thank you call from ED	48 hours			x			
	Welcome letter	First week	x					
	Annual donor lunch invite	Annually		x	x	x		
Recognition	Annual Report Listing	Annually			x	x		
	Legacy Society Luncheon	First Month				x		
	Donor highlight in newsletter	Annually			x			
	Video Update of impact	Quarterly	x	x	x	x		
Reporting	Impact report	quarterly	x	x	x	x		
	Update on Gift use	2x year			x			
	Volunteer Opportunity	Quarterly	x	x	x	x		
	Donor survey	Quarterly	x	x	x	x		
Ongoing Engagement	Holiday cards	November	x	x	x	x		
	Donor summaries for taxes	Annually	x	x	x	x		
	Gala invitation	Annually			x	x		
	Donor Anniversary	Annually	x	x	x	x		
	Donor Stories	Quarterly	x	x	x	x		

GENERATIONAL DIFFERENCES



PERSONALITY TYPES

Communitarians	The Devout	Investors	Socialites
<ul style="list-style-type: none"> ▪ Give because of their sense of belonging to a social community ▪ Consider nonprofit organizations more effective at delivering social services ▪ Have a history in and are tied to local community 	<ul style="list-style-type: none"> ▪ Do good because it is God's will ▪ Giving is a moral obligation ▪ Donors should not expect personal recognition for giving time, talent, or money 	<ul style="list-style-type: none"> ▪ Philanthropy is good business ▪ Motivated by current and estate tax benefits ▪ Support organizations that are business-like and respond effectively to civic needs 	<ul style="list-style-type: none"> ▪ Focus on doing good works or giving because it is fun ▪ Fundraising is tied to socializing and entertainment ▪ "Charitable at heart"
	Altruists	RePAYERS	Dynasts
<ul style="list-style-type: none"> ▪ Causes and giving that provide a sense of purpose and fulfillment ▪ Believe giving promotes spiritual growth that is not religious in nature ▪ True philanthropy unfettered and untainted by business considerations or personal gain 	<ul style="list-style-type: none"> ▪ Do good in return for what they've received ▪ Believe the wealthy have a special responsibility to be philanthropic ▪ Insist on cost-effectiveness 	<ul style="list-style-type: none"> ▪ Philanthropy is a family tradition ▪ Philanthropy is part of their self-concept ▪ Philanthropy is universal; everyone's responsibility 	

Online Donors

Pillars of success in an online landscape & ways to get started.

Technology	Content	Communication	Benefits
Online "Profile"	Storytelling	Appreciation	Invitation to get more involved
Data Collection	Engagement	Impacts & Achievements	
Getting Started - Authenticity & Execution			
Review current systems. What makes sense to add?	Define your story and how to tell it.	E-cards, Video, Texting & Social Media	Transition to traditional stewardship.