



# Coalition U: Keeping Donors Engaged

Wednesday, May 20, 2015

9:00am – 11:00am

Peirce College, 1420 Pine Street

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## I. Welcome

Sharmain Matlock-Turner

*President & CEO, Urban Affairs Coalition*

## II. Workshop Presentation: Keeping Donors Engaged

Felicia D. Harris, *Facilitator*

*Marketing Communications Coordinator, Urban Affairs Coalition*

### 1. Learning from our experts

### 2. Goal Setting

### 3. Donor Engagement Plan

## III. Closing Remarks

Arun Prabhakaran

*Vice President & Chief External Affairs Officer, Urban Affairs Coalition*

## IV. Networking Power Hour (11am – 12pm)

## About Coalition U

The Urban Affairs Coalition re-launched its capacity building initiative, Coalition U, in 2014 to help nonprofit organizations strengthen their infrastructure, build capacity, and maximize community impact. Coalition U offers a variety of capacity building seminars and workshops focused on improving nonprofit organizational growth and development to make effective changes in the communities they serve. To learn more about Coalition U, please email us at [CoalitionU@uac.org](mailto:CoalitionU@uac.org)

## About the Urban Affairs Coalition

The Urban Affairs Coalition unites government, business, neighborhoods, and individual initiatives to improve the quality of life in the region, build wealth in urban communities, and solve emerging issues. We are a Coalition of 65+ partner organizations, large and small, working on diverse issues that immediately affect communities. We strengthen nonprofit organizations through fiscal sponsorship, capacity building, and program evaluation; improve life chances for youth and young adults; and provide economic opportunity to low-income households, working families, and disadvantaged businesses.

## What We Do

The Coalition shapes public policy and delivers programs that respond to urgent community needs. The problems we face are far too complex for one entity to solve on its own. Our deep community roots and strong linkages to public and private groups allow us to bring together a diverse set of resources around specific issues to drive change from the ground up. The Power of Coalition means that, together, we can accomplish what no one organization can do alone.

## Our Priorities

- Strengthening nonprofits
- Building wealth in urban communities
- Developing youth and young adults
- Creating strategic partnerships

To learn more about the Coalition and its partners, please visit [www.uac.org](http://www.uac.org) or call 215-851-0110.

Question about upcoming Coalition U Workshops? Email [CoalitionU@uac.org](mailto:CoalitionU@uac.org)

## Primary Contact - Coalition U

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## Primary Contact - UAC Fiscal Sponsorship & Partnership Opportunities

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## Best Practice Tips from our Experts

Presented at Coalition U on March 24, 2014

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### Coalition U Contributors

#### **Lynn Marie Johnson-Porter**

*Vice President of Philanthropy*

Presby's Inspired Life

#### **Ina Lipman, Esq.**

*Executive Director*

Children's Scholarship Fund

#### **Aimee Miller**

*Senior Vice President and Partner*

Fairmount Ventures

### Prospecting for New Donors

- Engage your base! Ask longtime or major donors if they know two people who'd be excited about your mission, and would be willing to connect them for an introductory meeting or tour.
- The most accomplished Development professionals do everything they can to extend the life of existing donors and utilizing those relationships to identify additional avenues for support. Additionally, they remove any variables that might cause existing benefactors to leave their organizations. Be sure to:
  - Introduce a series of "reactivation" techniques, including personal letters, phone calls, and personal visits from leadership.
  - Recognize previous support to increase loyalty. Utilize letters; commemorative plaques; regular receptions for donors; listings in annual reports; and providing access to privileged events or information.
- Secure a fundraising board to look for new board prospects if your current board is not focused on fundraising.

### Ways to Engage New Donors

- Consider a monthly sustainer campaign starting at a barrier-free price point (e.g., as low as \$5 or \$10 a month).
- Create activities/events that allow donors to directly experience your mission and those you serve.
- Engage a Young Friends group to host a networking event and launch a 3-4 week campaign to raise money for a very concrete need. Use an online platform like Indiegogo or Razoo to spread the word online.

- Enlist a volunteer or pro bono company to make a short, compelling video telling your organization's story from the clients' perspective. Share it online and via email along with a specific "ask".
- Remind people that you rely on donations! Spotlight volunteers or members who give in electronic communications, and make sure you provide an easy, one-click donate button.
- Remember: the "best prospects" vary from organization to organization. But, most non-profits find success in gaining support from constituents, board members, staff, current and lapsed donors, vendors and those generous to similar causes.
- Design fundraising activities to nurture the relationship and foster involvement. This might include:
  - Newsletters and general mailings;
  - Invitations to tour facilities;
  - Social and informational gatherings, including a gracious and fun buffet with the Executive Director, Board Chair, Board Members or key staff—all of which are useful in the cultivation process.
- Focus Groups also provide useful information about attitudes. Participants, both donors and prospects benefit from exploring and sharing their attitudes.

### **Cultivating Relationships with Existing Donors**

- Always have regular non-solicitation updates and communication with your donors. Always follow-up meetings with a prompt handwritten thank you.
- Your Board members are your best organizational ambassadors. Make sure they all have a 30-second "elevator speech" and 2-3 talking points they can share with others who may care about your mission.
- Assign Board members 2-3 donors or prospects at a special event; their job is to connect with those individuals, thank them for their support, and find out why the organization is important to them.
- On a rotating basis, ask Board members to call or write personal thank-you notes to donors in addition to the formal IRS acknowledgement letters they receive.
- Remember that many major donors are business executives. Therefore, it is prudent to examine the respected sales techniques they are accustomed to and how they are applicable to donor relationship management. Although aggressive sales practices may differ from major donor development, the art of customer-centric relationship management has a lot of similarities to major donor relationship management.
  - Show your customer/donor respect—it demonstrates the importance of their gift.
  - Make your customer/donor feel special—they will feel good about their involvement in the mission.
  - Provide good customer service—it demonstrates your organization's competence.
  - Have a positive attitude and show enthusiasm—it demonstrates confidence in what your organization is doing and will help your donor become excited about their giving.
  - Respect your organization/mission—it is difficult to convince others to give to your organization if you do not believe in what it is doing.

- Know your product/mission—donors will have more confidence in giving if you are able to help them understand the impact/value your organization is making.
- Demonstrate good ethics—it will build trust and confidence in your organization.
- Ask your customer/donor meaningful questions—determine what their positions are so you can explain how their philanthropic goals align with what your organization is doing.

## Closing the Deal/Securing funding

- **Don't be afraid to ask.** The answer is always no if you don't ask. And remember, the gift is going to a mission you believe in and not to you personally – so feel confident in that ask.
- **Follow your instincts!** Asking for a gift should not be a transaction; it is a conversation that gives a prospect the opportunity to invest in a mission that they care deeply about.
- **Be an active listener.** Consider an interim meeting to ask prospects which aspects of your services are most exciting to them, and talk about your plans and funding needs for the future. Then, tailor a follow-up request that is most likely to match their interests and your organizational needs.
- **Understand “why people give.”** The reasons are as follows:
  - Belief in an institution and its purpose
  - Belief that current needs are important
  - Sense of loyal, gratitude, affection
  - Tax considerations
  - Friendship and respect for the solicitor; “People give to people.”
  - Honoring the past
  - Funding the future...not the past
  - Involvement with peers; Volunteers make a difference!
  - Recognition
- **Identification with a “winner” and the #1 reason people give:** They were asked!
- **When making the "ask:"**
  - It is best to have a team of two solicitors
  - Determine in advance which of the two solicitors will ask for the gift
  - Have a specific dollar amount in mind
  - Helpful words to use include: “consider,” “join me”
  - Be quiet after the ask...listen
  - Do not leave a pledge card
  - Verbally outline next steps
  - Close meeting graciously
  - Send thank-you note for their time and consideration, even if they have not given you their answer.

## GOAL SETTING

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Make your goals realistic. We all want to bring in big money, but consider these things when setting your goals:

- **Previous giving history** – How much do your current donors give? Or are you starting from scratch? If starting from scratch, what is the giving potential of your prospect pool? How much money do *similar* organizations raise and how do they do it?
- **Your current capacity** – Fundraising takes time! Do you have a team to support your activities? Do you personally have time for follow up meetings?
- **Technology** – Have you or will you make the time to invest in the tools you need to reach these goals such as donor base management? E-newsletter software? Social media management? Who will manage this technology and are you comfortable using it yourself if all else fails?
- **Start small so you can exceed your goal.** At the end of the year evaluate what you did, how you can do it better and slowly begin increasing your goals.

**Refer to Donor Engagement Worksheet to complete these goals as part of your plan.**

### Donor Engagement Goals:

We will increase our current annual individual contributions by \$\_\_\_\_\_ or \_\_\_\_\_%

We will engage \_\_\_\_\_ new donors by December 31, 2015

We will have at least \_\_\_\_\_ donors (new or current) commit to giving an average of \$\_\_\_\_/month

## Donor Engagement Plan

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### Quarterly check-in meetings and/or lunch with larger donors & supporters with connections to resources

- Don't just discuss the organization, connect on other topics of interests to your donor. People will give to people they like and trust!
- Use this time to ask for advice and feedback about your organization
- Always have a follow up action item for the meeting to keep the conversation going. Example: Sending them an email update or report, asking them to connect you with another person, etc.

### Have giving days unique to your organization

- Requires pre-planning and heavy marketing leading up to the giving day (consider making it a giving week)
- Tie your giving day/week to other key events or programs your organization already does
- Make sure you have a clear call to action for your campaign

### Go Mobile

- Is your website mobile friendly?
- Are your emails mobile friendly? This includes e-newsletters.
- Be able to accept donations online

### Showcase your impact

- Share stories and testimonials from your clients
- Providing opportunities for donors to hear the stories of, hear directly from, or even meet those whom they have helped can go a long way toward helping the donor understand that his/her philanthropic objectives are being met.

### Be Smarter about using email

- Segment your list
- Personalize your mass emails with meta tags
- You can't just collect emails
- Consider using an email services such as Mailchimp or Constant Contact

### **Be a thought leader: share what you know (Content Marketing)**

- Storytelling
- Sharing content from other sources
- If you are an expert at what you do, share it!
- Have a schedule
- Monitor your data on social media, website clicks (what do people come to your website for?)
- Have your constituents share their own stories of how you've helped them. Track it with a hashtag
- Develop your own unique hashtag

### **Events that allow donors to directly experience your mission**

- Open Houses
- Volunteer opportunities
- Opportunities for Donors to meet your team
- Fundraising Events
- Annual Meetings

### **Celebrate and thank your donors**

- Personal hand-written note from a Board Member
- Personal calls or letters from the leader of the organization
- Birthday Cards

### **Monthly Giving Campaigns**

- Allow your donors to set up a reoccurring payment option (justgive.org, paypal, etc.)
- \$10/month = \$120 OR \$50/month = \$600 OR \$100/month = \$1,200
- Best way to get millennial donors and those with smaller budgets to give



## Using Social Media to Engage Donors

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### ✚ Used to raise small amounts of money online

- Promote and link to a crowdfunding campaign
- Get donors to commit to smaller monthly donations

### ✚ A picture says a 1,000 words but a video can say a million

### ✚ Platform to get your donors to introduce you to their networks

- Spotlight them (with their permission) on your page and ask them to share and repost.

#### Crowdfunding Platforms

[www.indiegogo.com](http://www.indiegogo.com)

[www.gofundme.com](http://www.gofundme.com)

[www.kickstarter.com](http://www.kickstarter.com)

[www.crowdfunder.com](http://www.crowdfunder.com)

**Check out this Forbes article on how to choose the best crowdfunding platform for you:** <http://www.forbes.com/sites/chancebarnett/2013/05/08/top-10-crowdfunding-sites-for-fundraising/2/>

## Facebook Strategies

Facebook allows for real-time updates and interactions, while offering space for longer posts and add-ons such as event pages, groups, and applications. Facebook is where your personality will shine through!

### Facebook News Feed ads

- Create “Calls to Action” Pay for Facebook ads
- Boost your most popular posts
- Post once daily, 4-7 days per week
- Share relevant articles
- Share photos
- Tag other like-minded organizations and the people in your pictures
- Create YouTube tab to share videos
- Advertise \$5 - \$10 per day for first five days after initial launch

**Resource:** How to Create a Facebook Page for your Nonprofit Organization  
<https://youtu.be/pcxu8yHdBUM>

## Twitter Strategies

Functioning like a micro blog, Twitter is a huge news source with information being shared as it becomes available. Twitter allows for interaction, video and photo sharing, but limits posts to 140 characters, making it simple and most efficient when regularly updated.

- Adjust bio information to improve SEO (Search Engine Optimization) – Use popular keywords and phrases
- Identify key profiles to follow
- Post 2-8 times per day
- Set up automated responses to new followers
- Send more traffic to your website by share your website address in posts
- Position yourself as an expert in your industry
- Develop lists
- Retweet relevant information
- Share provided photos
- Use existing hashtags and create as needed
- Keep expanding your Twitter community
- Stay current
- Monitor mentions and retweets
- Identify influencers and supporters

## Resources

Bufferapp.com helps populate content for your twitter account!

Twitter 101 Video: <https://www.youtube.com/watch?v=Y0mLVEvIWa8>

## LinkedIn Strategies

LinkedIn acts like an online business card, allowing users to share resumes, recommendations and updates with other professionals. While LinkedIn was originally geared toward job seekers, it is now a driving force in networking and customer/clientele building.

- Post 1-5 times per week
- Create a group and invite your donors to join
- Offer credibility
- Expand your business contacts
- Expand your company network
- Key word searches
- Assist in building personal network to add influence to their profile

## YouTube Strategies

While YouTube is most obviously a video sharing network, it is also a huge Search Engine Optimization booster. Every video posted can be tagged, increasing Search Engine Optimization of your brand name/company.

- Share videos on a regular basis – monthly at minimum
- Add closed captions and annotations to any existing videos
- Implement calls to action
- Seek out other channels and subscribe and like videos
- Share videos on other social media channels

## Instagram Strategies

While YouTube is most obviously a video sharing network, it is also a huge Search Engine Optimization booster. Every video posted can be tagged, increasing Search Engine Optimization of your brand name/company.

- Don't post pictures immediately. Take time to edit them and create great captions.
- Add text over your images
- Use Latergram.com to create posts that you want to post in the future. It will also send you reminders.
- Identify influencers and supporters
- Tag other like-minded organizations and the people in your pictures

**Resources:** Download these to your phone to improve photo editing

Textgram  
Instacollage  
Repost App

## Social Media Tools

### QuillEngage.com

Quill Engage is a free tool that connects with your Google Analytics account and emails you a weekly summary of your data. It tells you about your site's traffic growth or decline, where your traffic came from the previous week, which post got the most traffic and much more.

### Bufferapp.com

Used for scheduling and sharing posts to Twitter, Facebook, LinkedIn and Google + throughout the day, at the optimal times. It's a super easy to use tool, and includes detailed analytics so you know what's working where, why and when.

**BufferBulk.com** (an extension to Bufferapp.com)

An extension for Buffer that allows you to upload items to Buffer in bulk. It's perfect if you're looking to share content from a large source or plan your sharing schedule for the week.

**Post Planner**

An app built inside Facebook that offers a value-packed dashboard to help you manage and enhance your Facebook strategy. Post Planner not only allows you to schedule updates in advance, it also gives you an entire list of status ideas, access to the most viral posts on Facebook and insights on trending content based on your industry. It even has free training to help you maximize your presence on Facebook.

**Hootsuite.com**

Schedule posts for Twitter, Facebook, LinkedIn, Google+, Foursquare, MySpace, and WordPress all from one platform.

**Other Resources for Social Media tools:**

<http://www.convinceandconvert.com/social-media-tools/the-39-social-media-tools-ill-use-today/>

<http://www.socialmediaexaminer.com/44-social-media-tools-recommended-pros/>

<http://www.entrepreneur.com/article/239538>



