

Donor Engagement



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Customer Success Instructor



Donor Engagement



Donor Engagement– What is it?

- Process for building relationships
- Like “moves management” but more inclusive
- Segments constituents to customize messaging and interactions
- More than fundraising

Donor Engagement– Why do I need it?

- Identify major gift, planned giving, volunteers, and recurring giving prospects
- Create goals and strategies
- Track progress
- Connect to constituent's personal mission
- Validate strategies

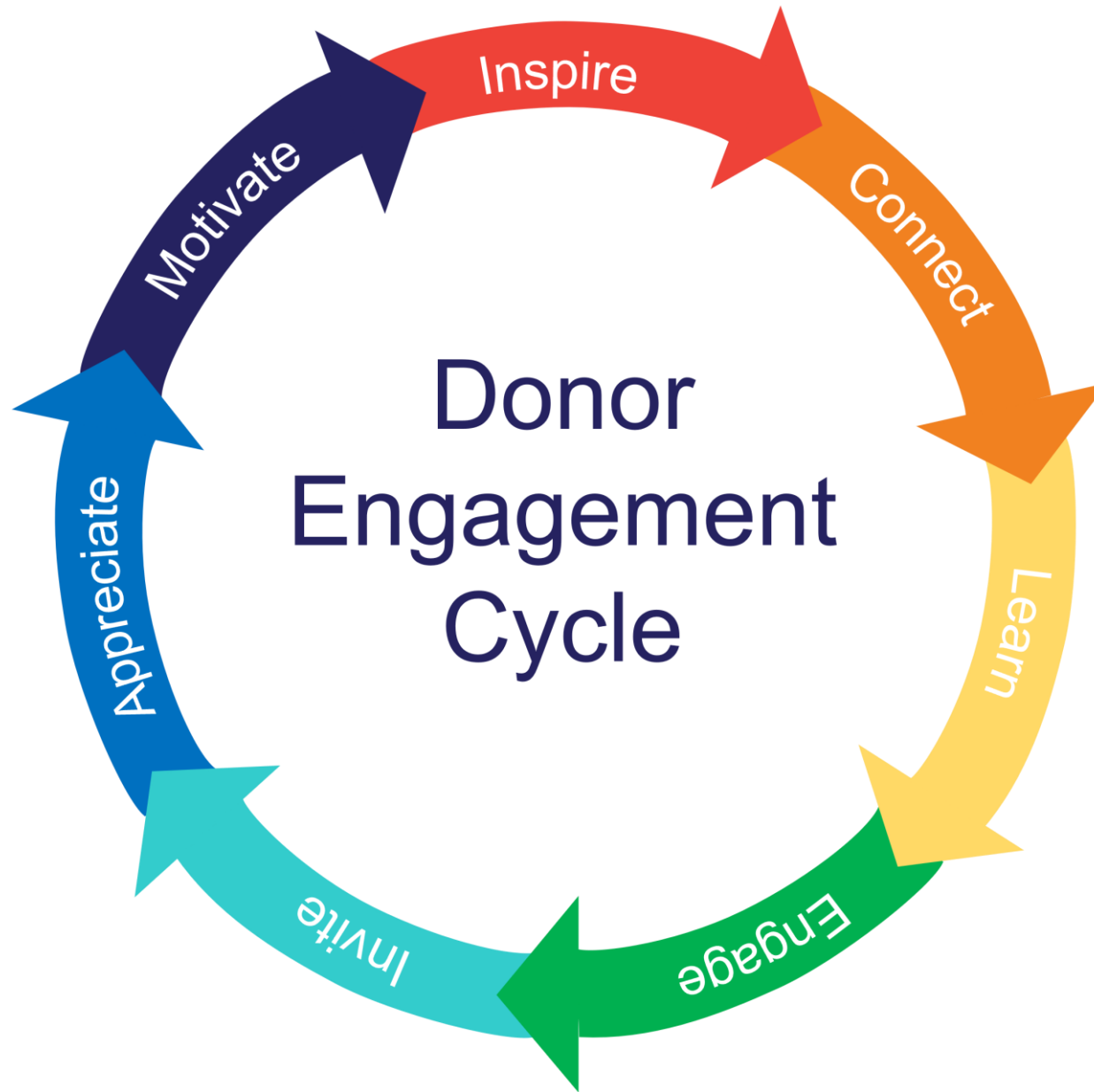
POLL 1

Does your organization have a formal donor engagement plan or moves management process?

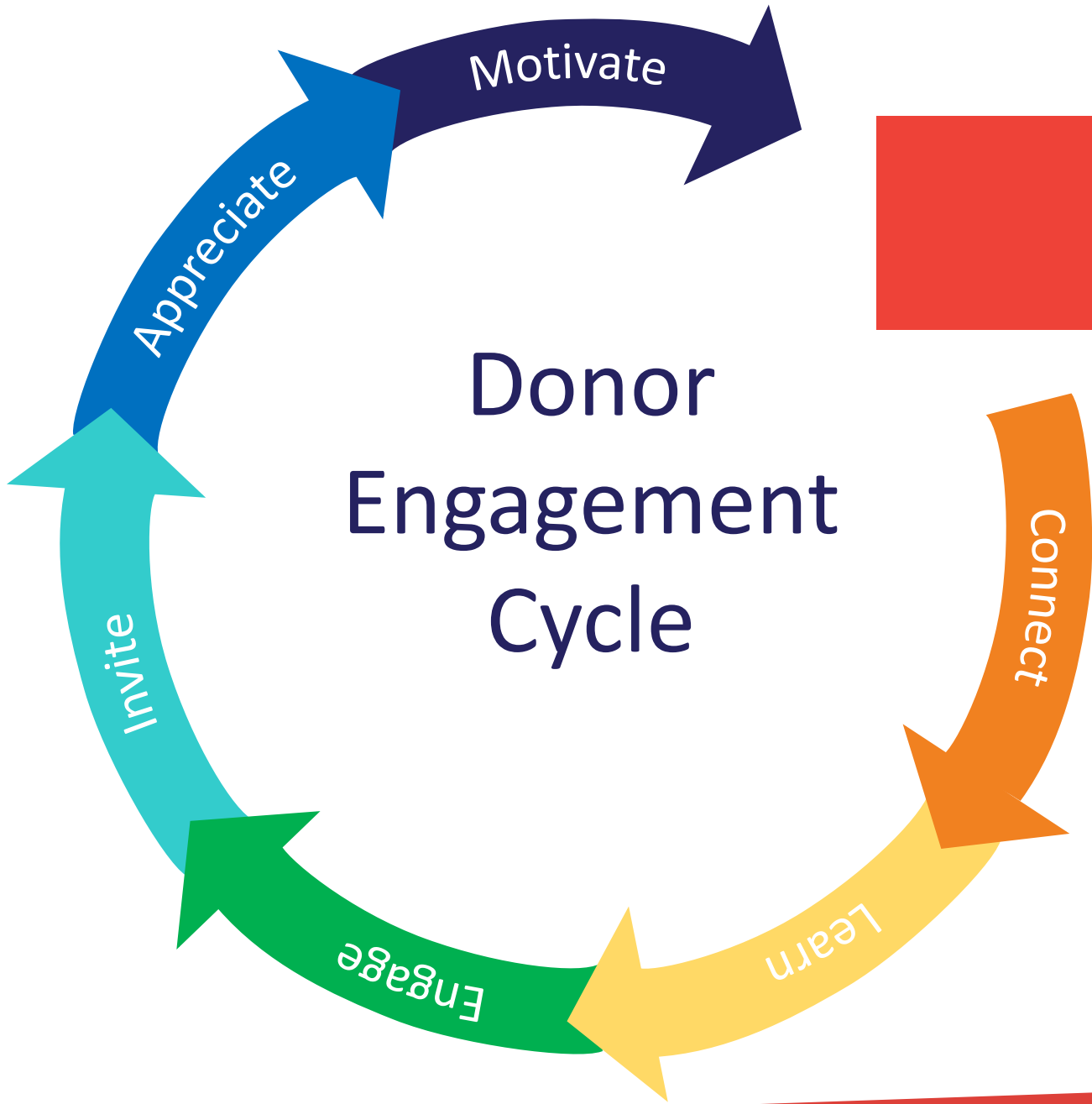
1. No, we do not use any formal process.
2. Sort of, we have an informal process.
3. Yes, we have a process, but we'd are not satisfied with the results.
4. Yes, we have a successful process in place and we are always looking for ways to improve.

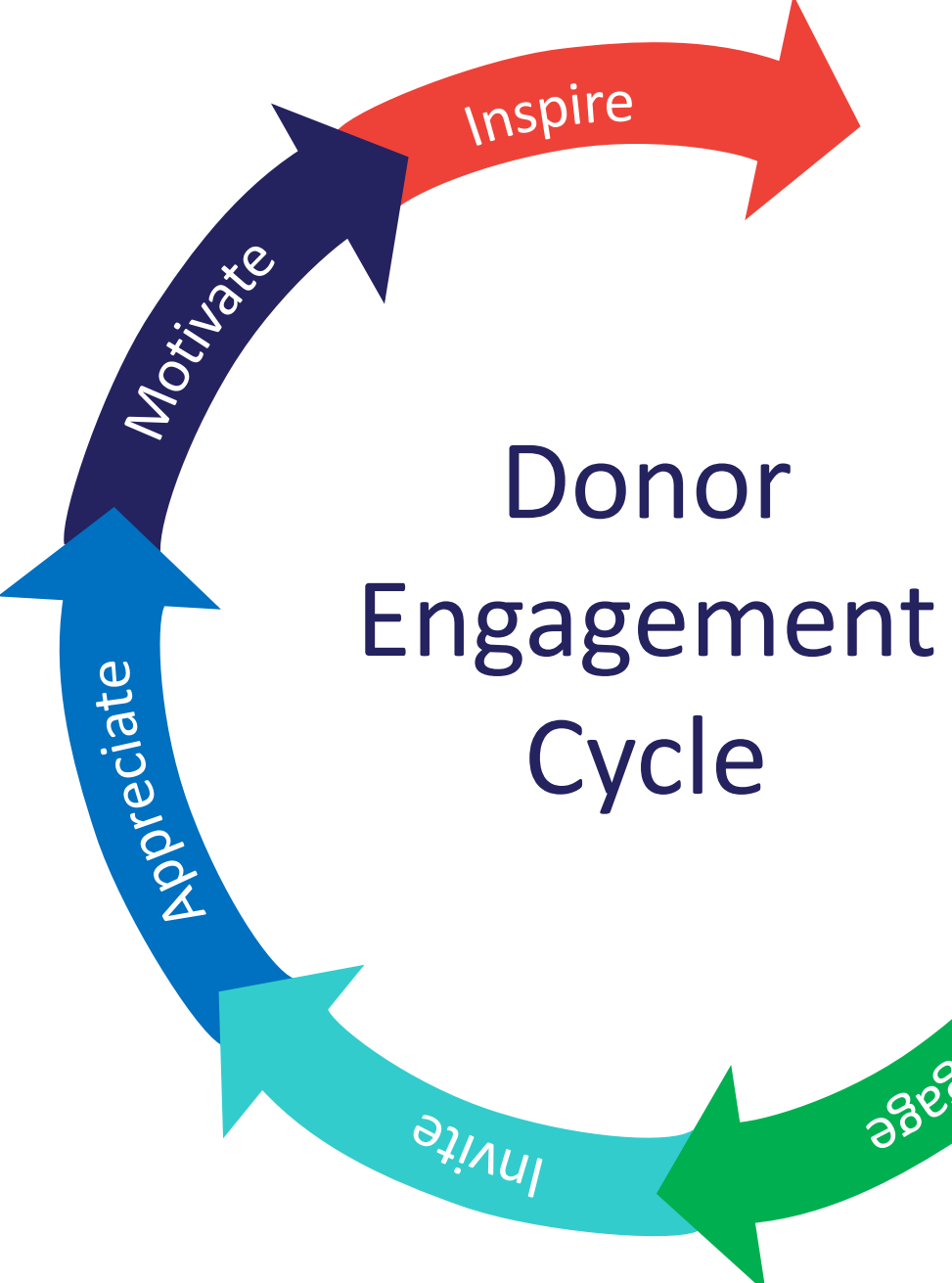
Donor Engagement– Annual Plan

- Add details to annual plan
 - Schedules
 - Assign responsibilities
 - Balance resources
- Define objectives
- Evaluate performance

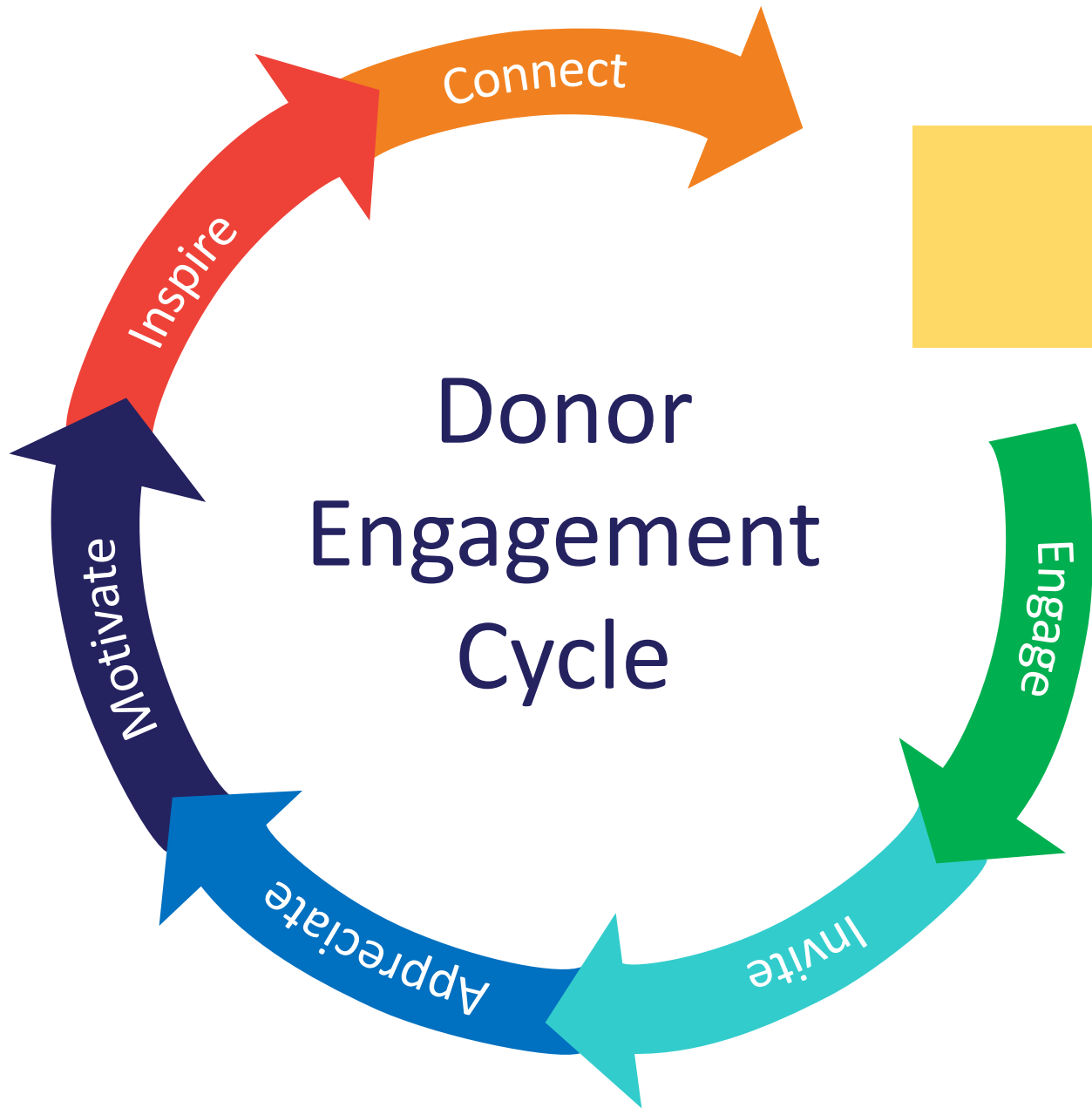


Donor Engagement Cycle

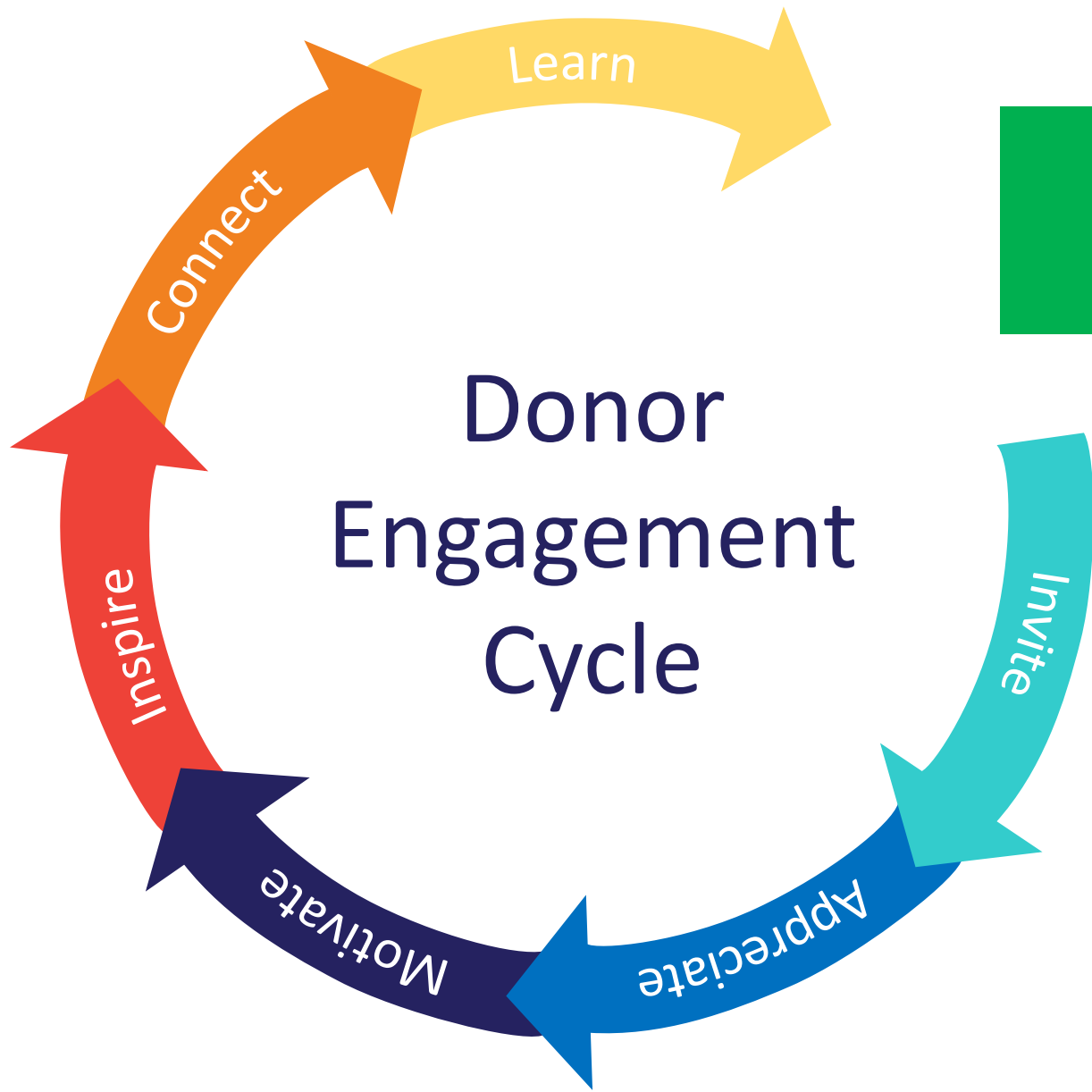


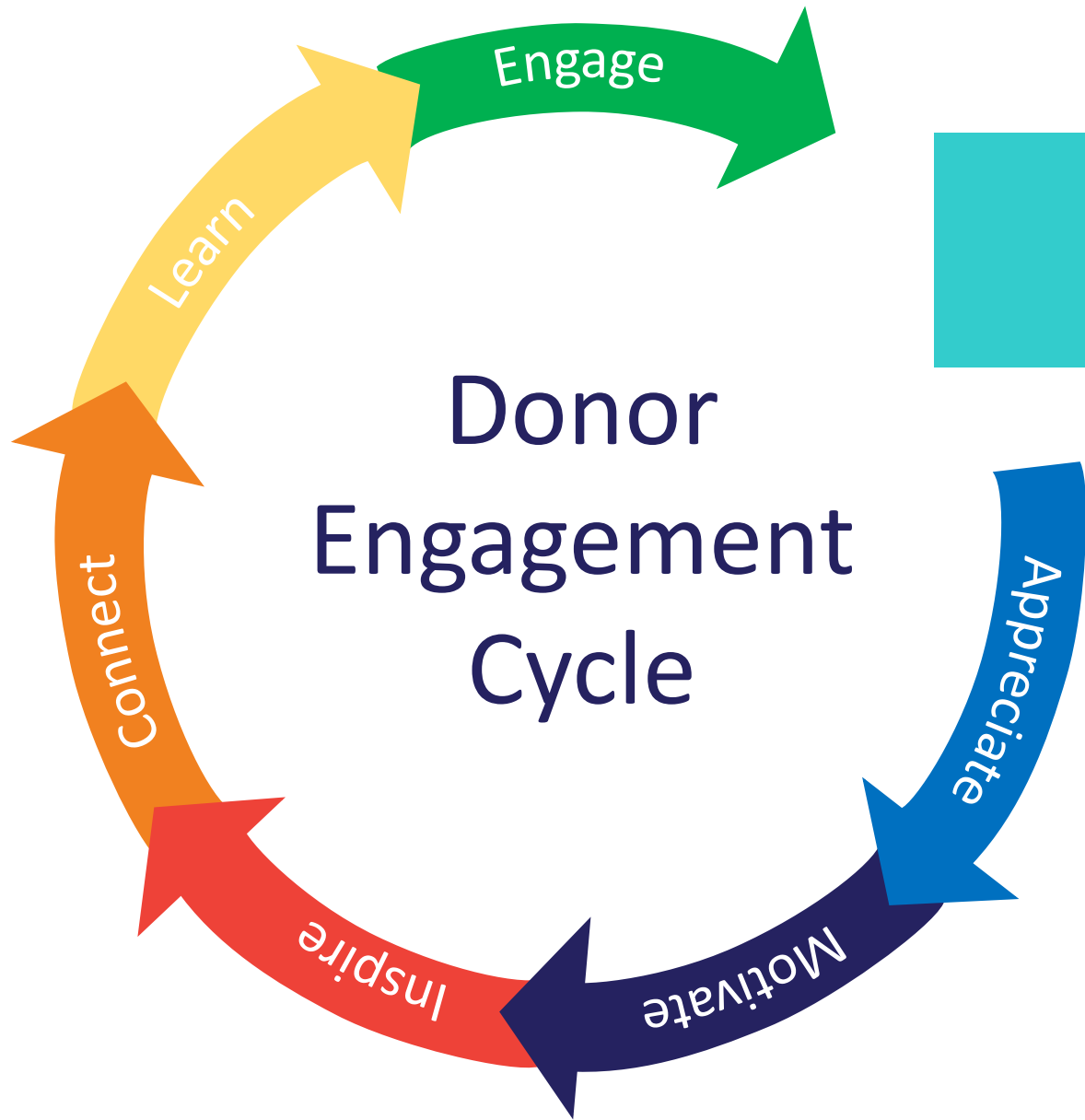


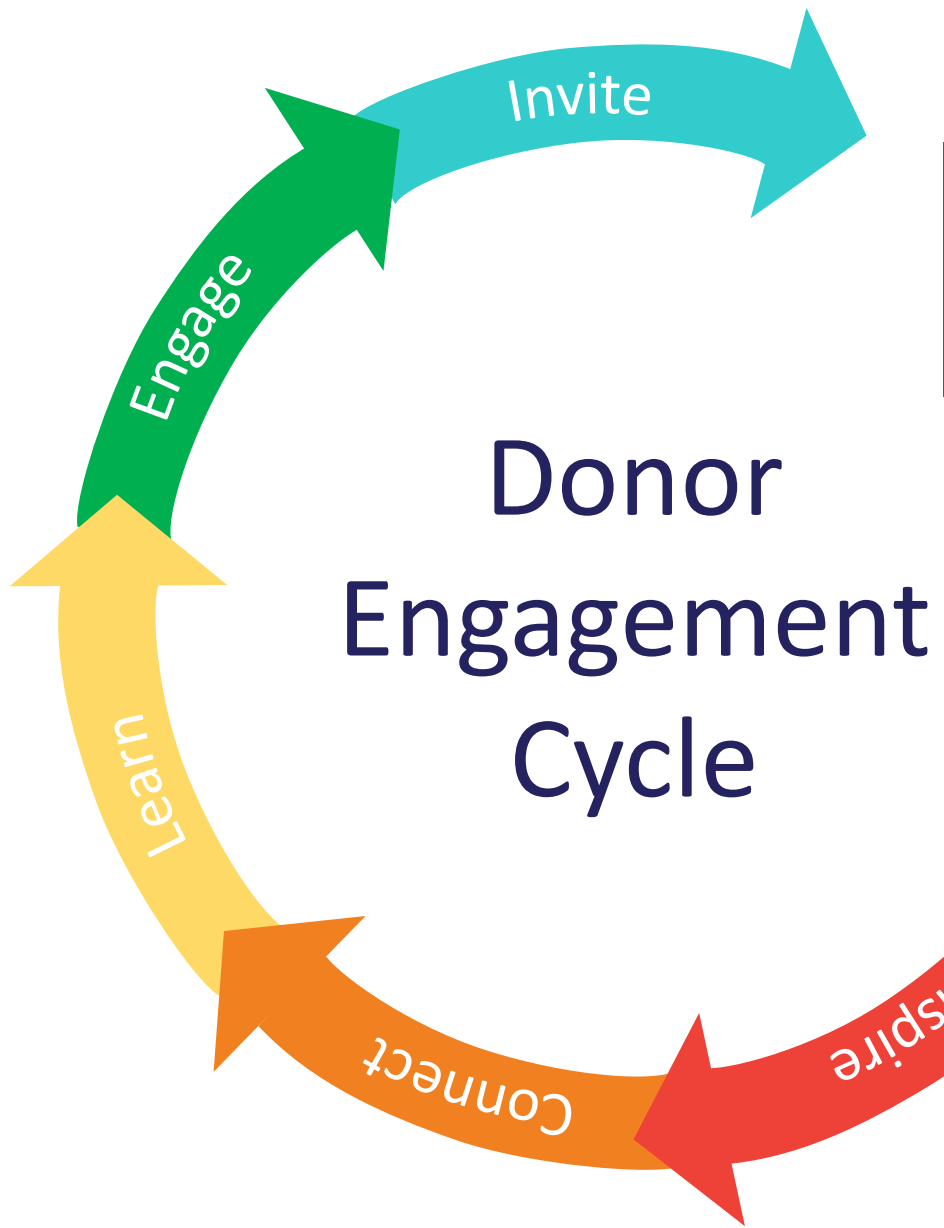
Connect



Learn







Appreciate



Motivate



Donor
Engagement
Cycle

Invite

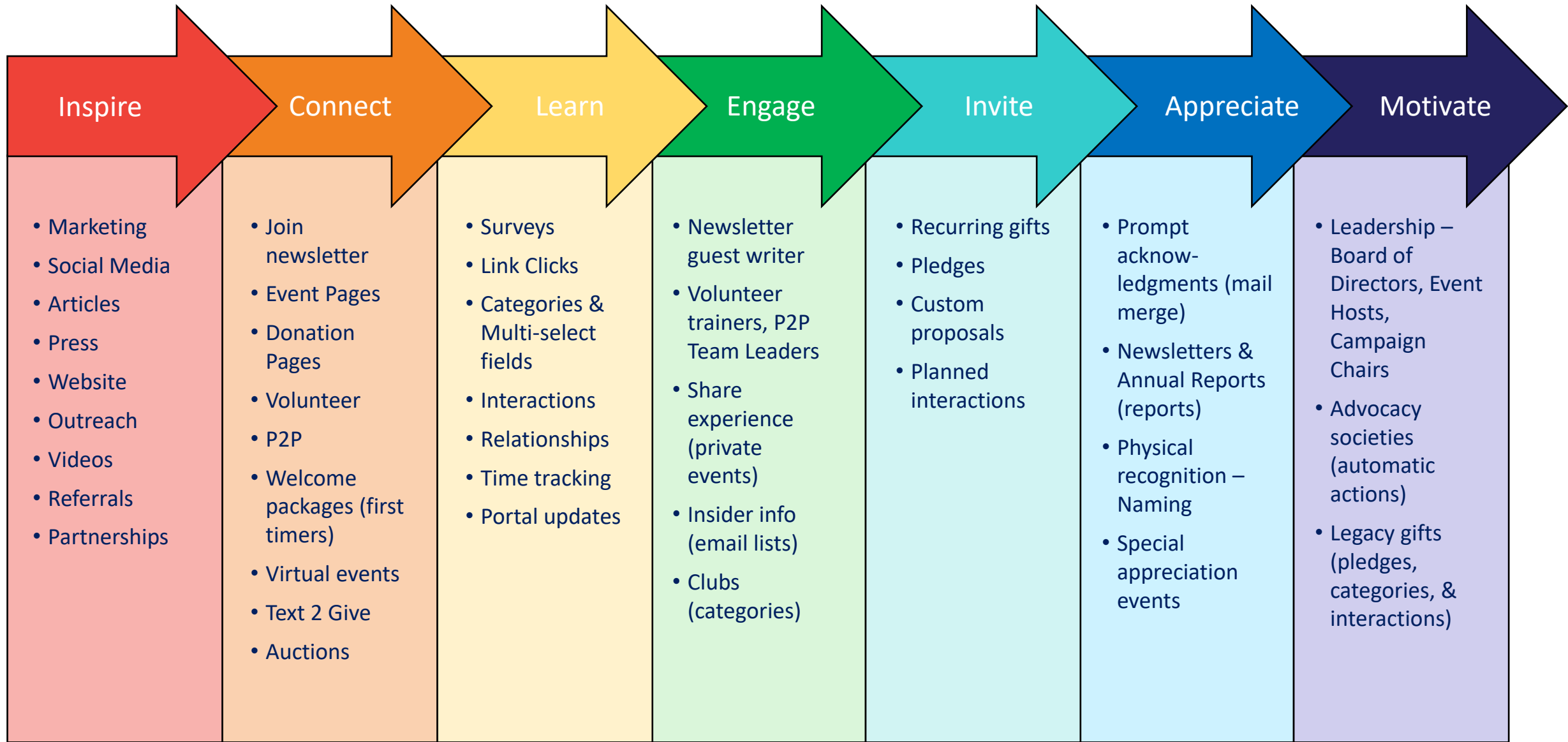
Appreciate

Inspire

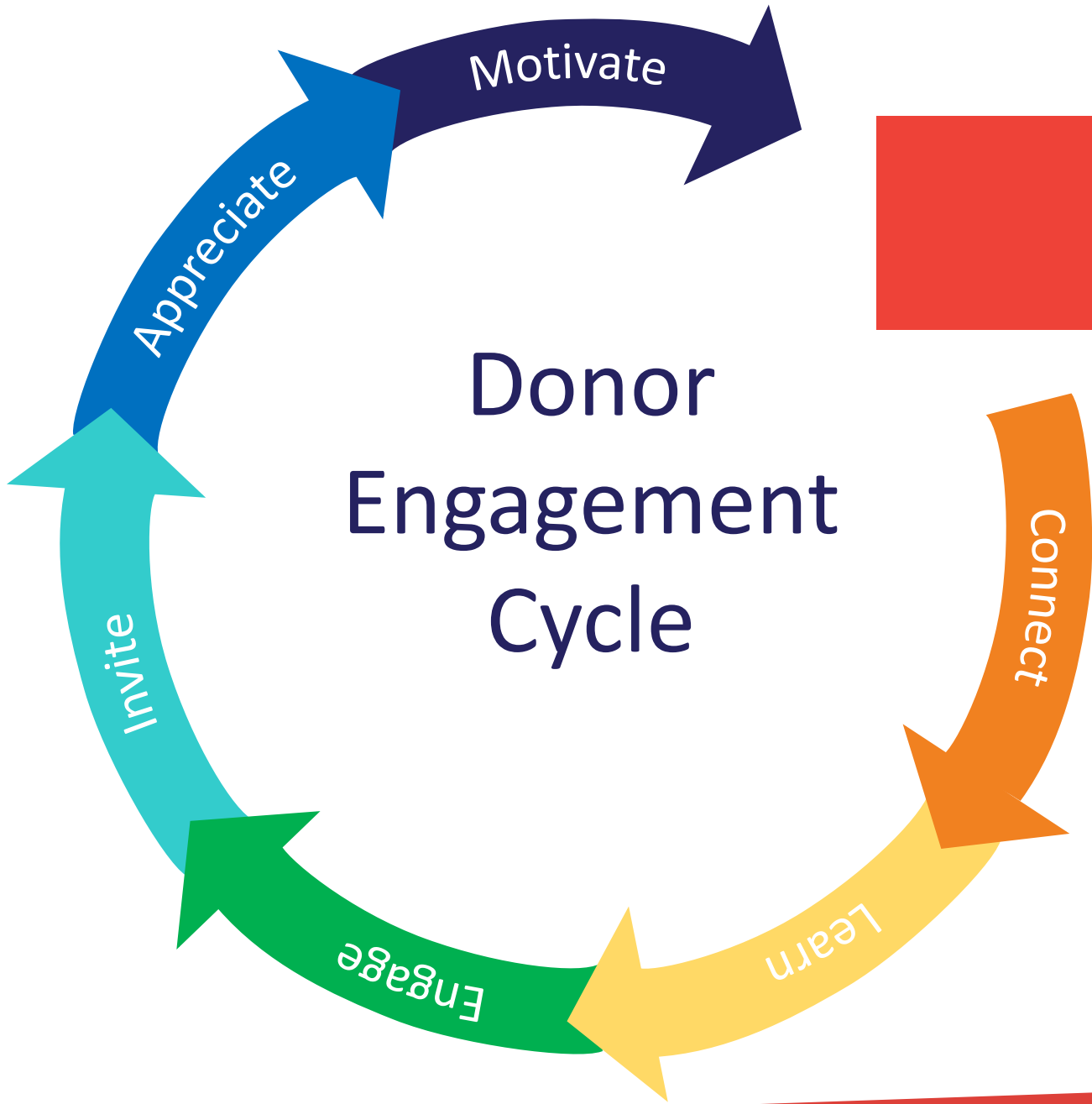
Connect

Engage

Learn



Donor
Engagement
Cycle



POLL 2

Does your organization have a communications or marketing plan?

1. No, we don't have a plan.
2. Sort of, we do marketing, but it is not scheduled or planned.
3. Yes, we have a plan in place, but have a tough time managing it.
4. Yes, we have a formal plan in place and have good results.

Inspire – Creating Awareness

- Marketing activities & materials
- Website
- Outreach presentations
- Partnerships
- Referrals
- Social media
- PR

Donor Engagement Worksheets

Donor Engagement					
Inspire					
Website					
Site Visitors Last Year	2240	Site Visitors Goal	2900	% Change	29%
Bounce Rate Last Year	65%	Bounce Rate Goal	40%	% Change	-38%
Session Duration Last Year	1.35	Session Duration Goal	2	% Change	48%
Conversion Rate Last Yr	4%	Conversion Rate Goal	5%	% Change	25%
Month	Method	Activity		Responsible	Date
Jan	Post	Blog for new school semester tips		Jenkins	1/4/2024
Jan	Email	Invite new members to subscribe to blog		Jenkins	1/6/2024
Feb	Post	Blog for winter break educational activities		Jenkins	2/6/2024
Feb	Revise	Revise homepage for new UI		Garcia	2/26/2024
Feb	Email	Email all subscribers about new website		Jenkins	2/27/2024
Mar	Post	Blog for testing preps		Jenkins	3/5/2024
Apr	Post	Blog for spring break educational activities		Jenkins	4/2/2024
Apr	Revise	Revise volunteer schedule and programs pages UI		Garcia	4/19/2024
May	Post	Blog for summer camp		Jenkins	5/2/2024
May	Email	Invite new members to subscribe to blog		Jenkins	5/5/2024
Jun	Post	Blog for skipping the summer slide		Jenkins	6/6/2024
Jun	Revise	Complete remained of website UI update		Garcia	6/30/2024
Jun	Email	Email all subscribers about new website features		Jenkins	6/30/2024

Outreach							
Outreaches Last Year		2	Outreaches This Year		6	% Change	200%
Last Year Attendees		19	Projected Attendees		56	% Change	195%
Month	Method	Activity			Responsible	Date	
Mar	Outreach	Jensen Estates Homeowners Association			Washington	3/14/2024	
Apr	Outreach	Kiwanis Club Luncheon			Verney	4/2/2024	
Apr	Outreach	Martin Chamber of Commerce			Incal	4/19/2024	
Apr	Contact	Identify potential outreaches for summer & fall			Incal	4/30/2024	
May	Outreach	Gold Coast HomeBuilders Association			Incal	5/6/2024	
Sep	Outreach	Franklin Teachers Association			Washington	9/19/2024	
Nov	Outreach	Marietta Place Homeowners Association			Washington	11/4/2024	
Nov	Contact	Identify potential outreaches for winter & spring			Incal	11/15/2024	

Donor Engagement

Inspire

Partnerships

Partnerships Last Year		1	Partnerships This Year		3	% Change	200%
Month	Method	Activity			Responsible	Date	
Jan	Research	Create list of potential partnerships			Washington	1/16/2024	
Jan	Call	Contact prospects and set up meetings			Washington	1/31/2024	
Feb	Meet	Meet with Education Foundation			Washington	2/22/2024	
Apr	Meet	Confirm County School Board partnership renewal			Washington	4/19/2024	
Apr	Meet	Meet with Bixby Gym			Washington	4/23/2024	
May	Meet	Meet with Jobs Corp			Washington	5/13/2024	
May	Meet	Meet with Community Foundation			Washington	5/31/2024	

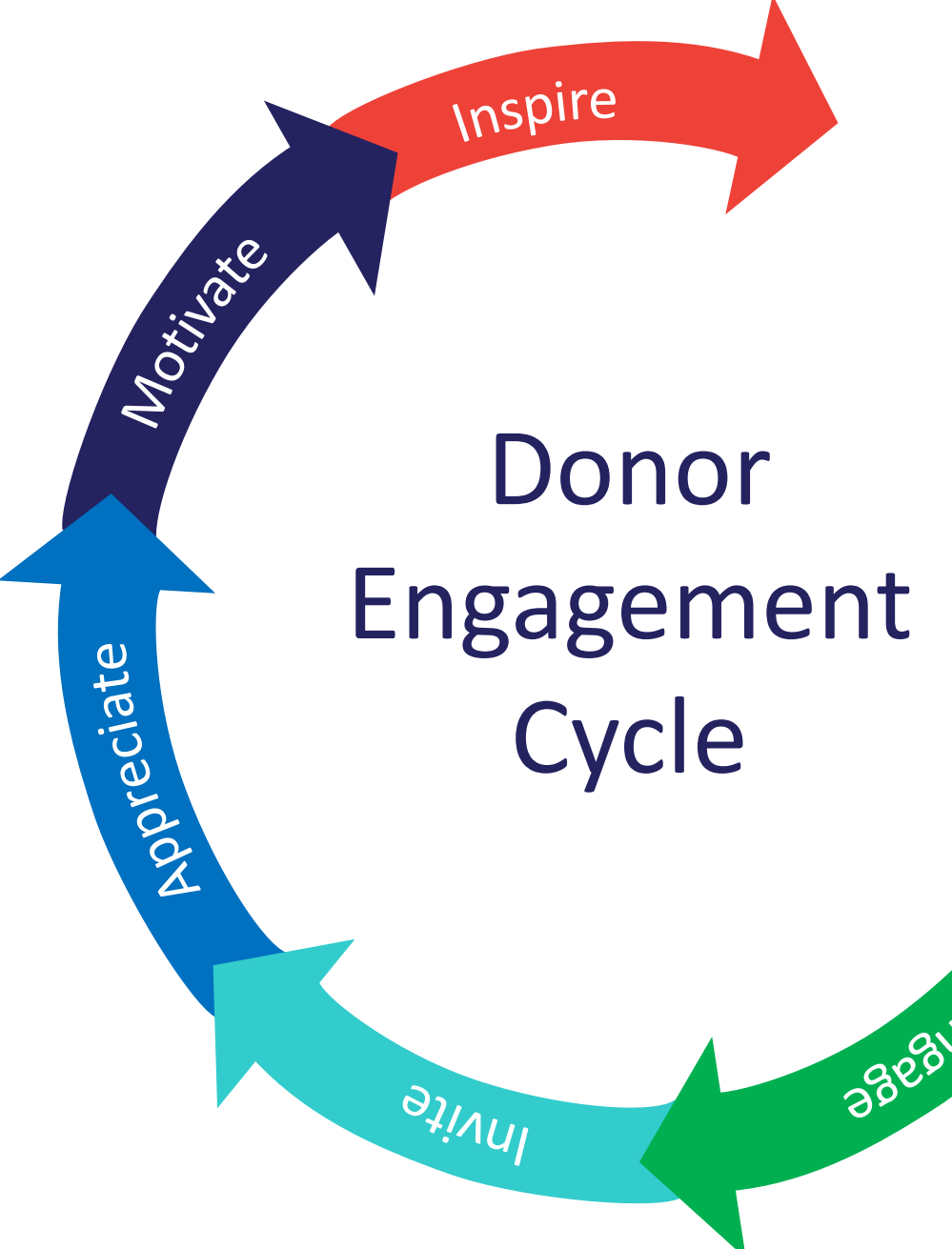
Public Relations							
Features Last Year		2	Features This Year		6	% Change	200%
Last Year Impressions		20000	Projected Impressions		40000	% Change	100%
Month	Method	Activity			Responsible	Date	
Jan	Submit	Press release for winter semester activities			Jenkins	1/3/2024	
Apr	Pitch	Local news feature for spring break programs			Jenkins	4/12/2024	
Apr	Submit	Press release for 5K race			Jenkins	4/29/2024	
Apr	Pitch	Local news feature for 5K race			Jenkins	4/29/2024	
May	Submit	Press release for summer camp			Jenkins	5/1/2024	
May	Submit	Press release for Behind the Scenes Tours			Jenkins	5/29/2024	
Jun	Submit	Press release for golf tournament			Jenkins	6/16/2024	
Aug	Submit	Press release for back to school			Jenkins	8/12/2024	
Aug	Pitch	Local news feature for back to school			Jenkins	8/12/2024	
Oct	Submit	Press release for gala			Jenkins	10/5/2024	

Donor Engagement

Inspire

Social Media

Facebook				YouTube			
Metric	Current	Goal	% Change	Metric	Current	Goal	% Change
Awareness	2000	2500	25%	Awareness	100	500	400%
Engagment	5	10	100%	Engagment	1	3	200%
Conversion	1	4	300%	Conversion	1	3	200%
Instagram				TikTok			
Metric	Current	Goal	% Change	Metric	Current	Goal	% Change
Awareness	500	750	50%	Awareness	5000	6000	20%
Engagment	1	4	300%	Engagment	10	15	50%
Conversion	1	2	100%	Conversion	1	3	200%
Month	Method	Activity			Responsible	Date	
Dec	Create	Social Media Calendar for Quarter 1 2024			Jenkins	12/4/2023	
Dec	Write	Write January social media posts			Jenkins	12/22/2023	
Dec	Schedule	Schedule January social media posts			Jenkins	12/23/2024	
Jan	Write	Write February social media posts			Jenkins	1/26/2024	
Jan	Schedule	Schedule February social media posts			Jenkins	1/27/2024	
Feb	Review	Review Jan SM analytics and update reports			Jenkins	2/1/2024	
Feb	Write	Write March social media posts			Jenkins	2/27/2024	



Connect

Connect – Easy entry points

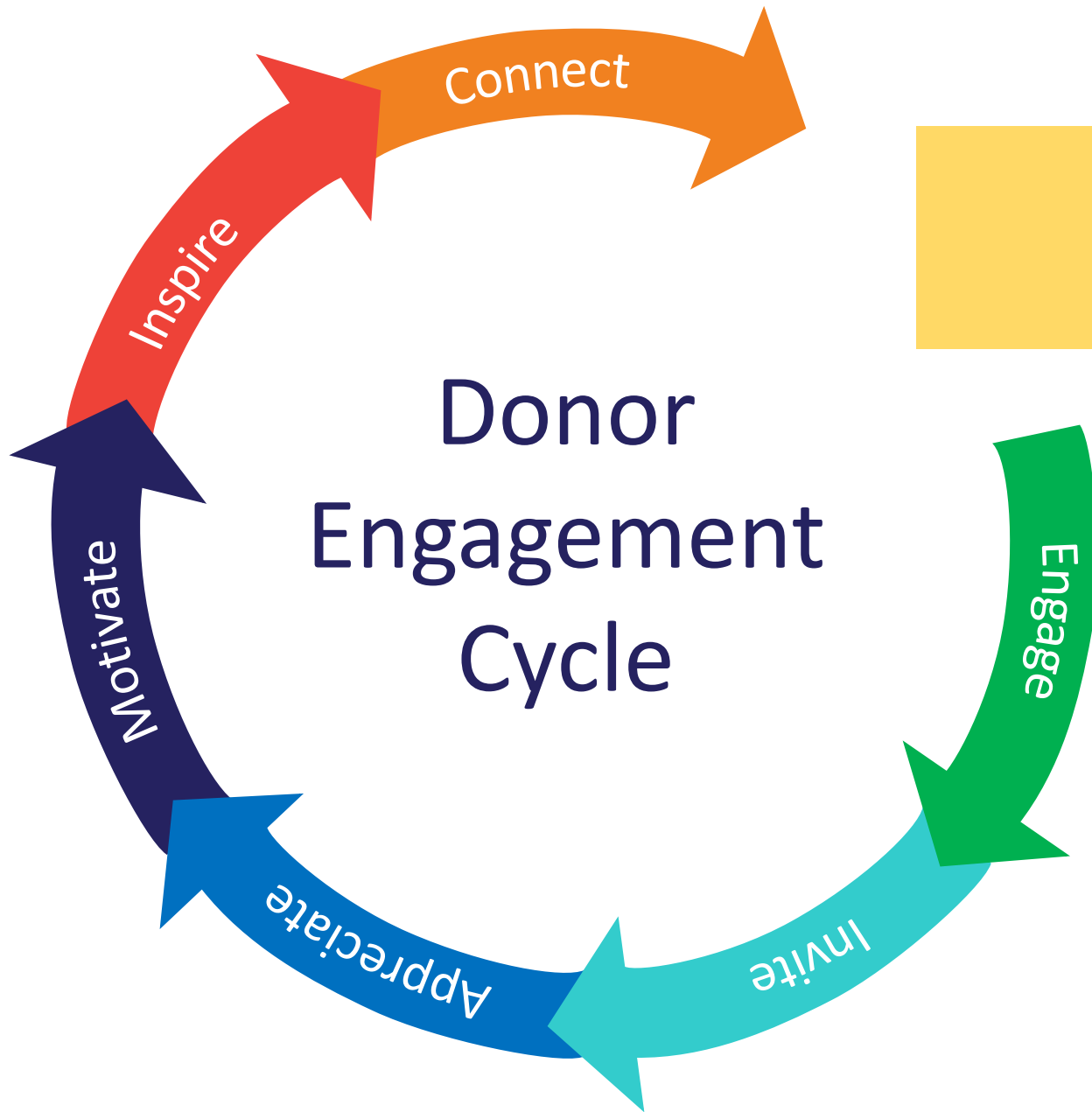
- Make it easy to connect
- Good first impression
- Make a small donation, purchase event tickets or join membership
- See & sign up for volunteer opportunities
- Text-2-Give or QR Codes
- Welcome packages

Donor Engagement

Connect

Month	Method	Activity	Responsible	Date	
Jan	Create	Create winter gala event page	Garcia	1/31/2024	
Mar	Research	Create summer programs event page with ops	Garcia	3/28/2024	
Apr	Create	Post new summer camp event sign up page	Garcia	4/26/2024	
May	Create	Post annual golf registration page	Garcia	5/19/2024	
Aug	Create	Create donation pages for Backpack Bonanza	Garcia	8/1/2024	
Aug	Create	Create fall volunteer opportunities page	Garcia	8/15/204	
Donation Pages			Text Link	QR Code	Web Link
Backpack Bonanza					
Summer Crush			✓	✓	✓
Holiday Helping Hand					
Event Pages			Text Link	QR Code	Web Link
Winter Gala Event Page			✓	✓	✓
Summer Programs					
Golf Tournament					
5K Race					

Membership Pages		Text Link	QR Code	Web Link
Youth Memberships				
P2P Campaign Pages		Text Link	QR Code	Web Link
5K Race				
Volunteer Registration Pages		Text Link	QR Code	Web Link
Fall Mentoring & Tutoring				
Email List Sign Up		Text Link	QR Code	Web Link
Homepage widget		✓	✓	✓
Text List Sign Up		Text Link	QR Code	Web Link
Homepage widget		✓	✓	✓
Welcome Packages		Frequency	Responsible	
New Volunteers		Weekly	Parker	
New Donors		Weekly	Parker	



Learn

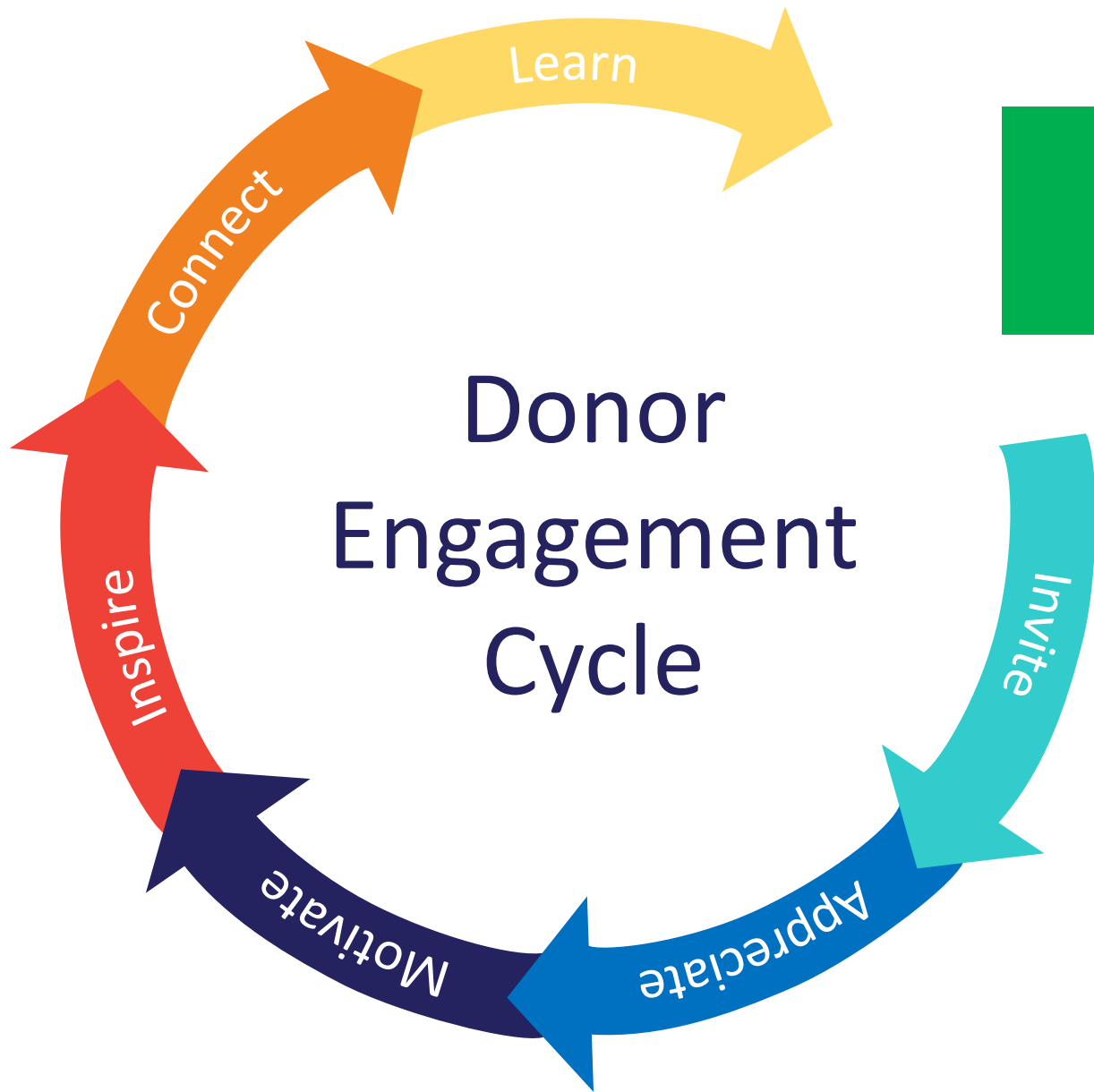
Learn – Get to know them

- Determine their personal mission
- Use surveys
- Add to categories or groups
- Preferred communication methods
- Relationships
- Volunteer activities
- Research

Donor Engagement

Learn

Surveys Sent		50	Frequency	Monthly	Response Rate	30%
Donor Research		10	Frequency	Quarterly		
Month	Method	Activity			Responsible	Date
Jan	Create	Create donor surveys			Mendez	1/17/2024
Feb	Email	Send first round of surveys			Mendez	2/15/2024
Mar	Analyze	Analyze first round of surveys to identify prospects			Wong & Mendez	3/4/2024
Mar	Email	Set up auto-action for new donor surveys			Mendez	4/4/2024
Apr	Review	Donor Research Report			Wong	4/23/2024
May	Review	Ensure all constituents have category			Mendez	5/11/2024
Jun	Interview	Interview volunteers - record in CRM			Klein	6/6/2024
Aug	Analyze	Review and report on new donor surveys			Wong & Mendez	8/18/2024
Sep	Review	Validate constituent relationships			Mendez	9/30/2024
Oct	Review	Donor Research Report			Wong	10/15/2024



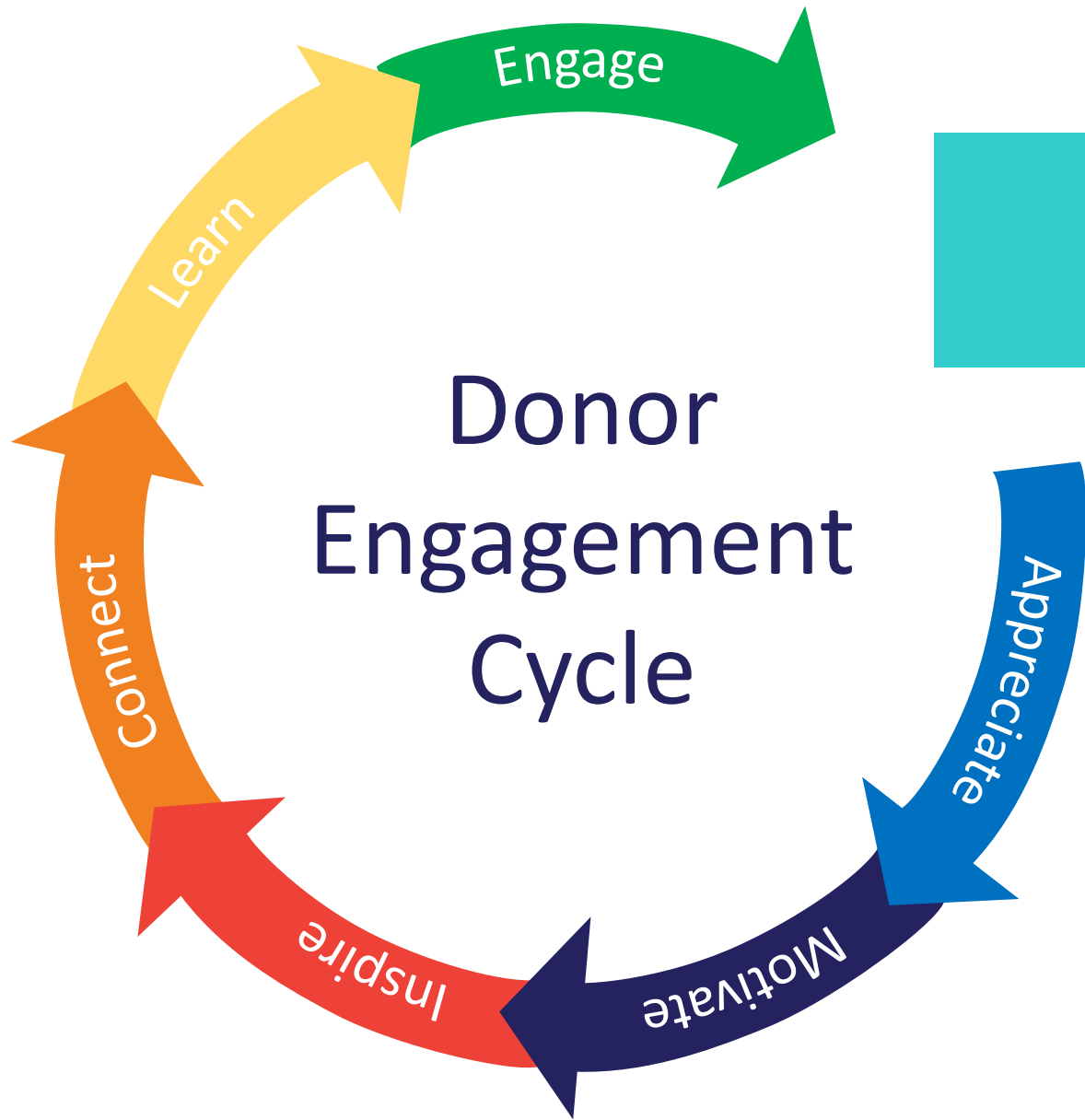
Engage – Level Up

- Guest writers
- Peer-2-Peer team leader
- Volunteer trainer
- Host a private event
 - Behind the scenes tours
 - Donor cocktail parties
- Clubs and societies

Donor Engagement

Engage

Guest Writers		6	Volunteer Trainers	8	
P2P Team Leaders		20	Behind the scenes Tours	4	
Mentor 99 Society		50	Donor Cocktail Parties	3	
Month	Method	Activity		Responsible	Date
Jan	Research	Identify potential guest writers for newsletter		Jenkins	1/14/2024
Jan	Phone	Invite guest writers		Jenkins	1/31/2024
Feb	Research	Identify volunteer lead trainers		Klein	2/15/2024
Mar	Train	Train new volunteer lead trainers		Klein	3/20/2024
Mar	Research	Identify potential hosts for cocktail parties		Wong	3/29/2024
Apr	Schedule	Schedule cocktail parties		Wong	4/14/2024
May	Mail	Send invites for cocktail party 1		Jenkins	5/9/2024
Mar	Research	Identify potential P2P team leaders		Allreden	3/22/2024
May	Train	Train P2P team leaders		Allreden	5/9/2024
Aug	Schedule	Schedule BTS tours		Klein	8/26/2024
Aug	Post	Set up registration page for BTS tours		Klein	8/27/2024
Sep	Submit	Announce BTS tours in newsletter and press release		Jenkins	9/19/2024
Oct	Research	Investigate creating new Mentor 99 Society		Wong	10/20/2024



POLL 3

Does your organization accept pledges or recurring donations?

1. No, it's not on our radar at this time.
2. No, but we'd like to start.
3. Yes, but we don't promote it.
4. Yes, we receive pledges and recurring donations.

Invite – Meaningful gifts

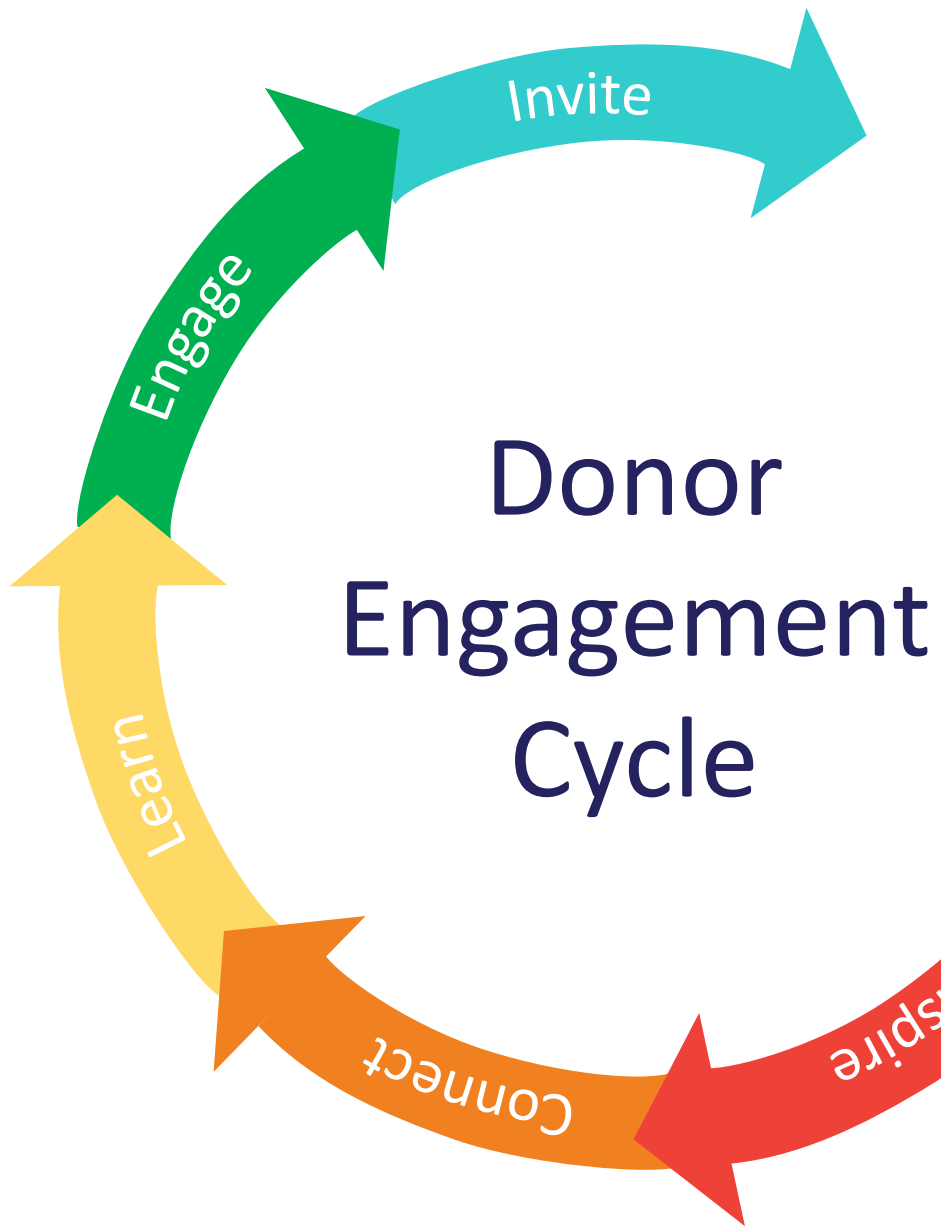
- Upgrade to recurring gifts
- Special appeals for specific projects
- Multi-year pledges
- Custom proposals for major gifts
- Utilize CRM to research, plan and track

Donor Engagement

Invite

Current recurring		17	Target recurring	50	Change	194%
Current Pledges		5	Target Pledges	15	Change	200%
Major Gift Proposals 23		4	Major Gift Proposals 24	10	Change	150%
Month	Method	Activity			Responsible	Date
Feb	Research	Identify prospects for recurring gifts			Washington	2/2/2024
Mar	Mail	Send invites for recurring gifts			Washington	3/3/2024
May	Phone	Call to follow up for recurring gift invitations			Washington	5/12/2024
Jul	Research	Identify prospects for multi-year pledges			Washington	7/20/2024
Sep	Meet	Set up meetings for multi-pledges			Washington	9/10/2024
Oct	Phone	Call to follow up for multi-year pledges			Washington	10/26/2024

Major Gifts					
Month	Method	Activity	Responsible	Date	
Sep	Phone	Call major donor prospects to thank for support	Mendez & Board	9/25/2023	
Nov	Meet	Set up meetings with major donor prospects	Mendez & Board	11/4/2023	
Giving Pyramid					
	Gift Amount	Number of Gifts	Sub-total		
	\$ 100,000	2	\$ 200,000		
	\$ 50,000	4	\$ 200,000		
	\$ 25,000	8	\$ 200,000		
	\$ 20,000	10	\$ 200,000		
	\$ 10,000	20	\$ 200,000		
			\$ -		
	Grand Total		\$ 1,000,000		
Major Donors					
Donor Name	Target Ask	Responsible	Project	Stage	Date
Sculthorpe	\$ 100,000	Wong & Board	General Operating	Cultivate	9/15/2023
Benjamin	\$ 100,000	Wong & Board	General Operating	Cultivate	11/4/2023
Hassid	\$ 100,000	Wong & Board	General Operating	Cultivate	11/6/2023
Folk	\$ 50,000	Wong & Board	General Operating	Qualify	11/8/2023
Freeman	\$ 50,000	Wong & Board	Healthcare	Solicit	11/12/2023
Basil	\$ 50,000	Wong & Board	Summer Camp	Qualify	11/15/2023
Perez	\$ 50,000	Wong & Board	Afterschool	Cultivate	11/16/2023
Irwin	\$ 50,000	Wong & Board	Afterschool	Cultivate	11/18/2023
Han	\$ 50,000	Wong & Board	Summer Camp	Cultivate	12/4/2023



Appreciate

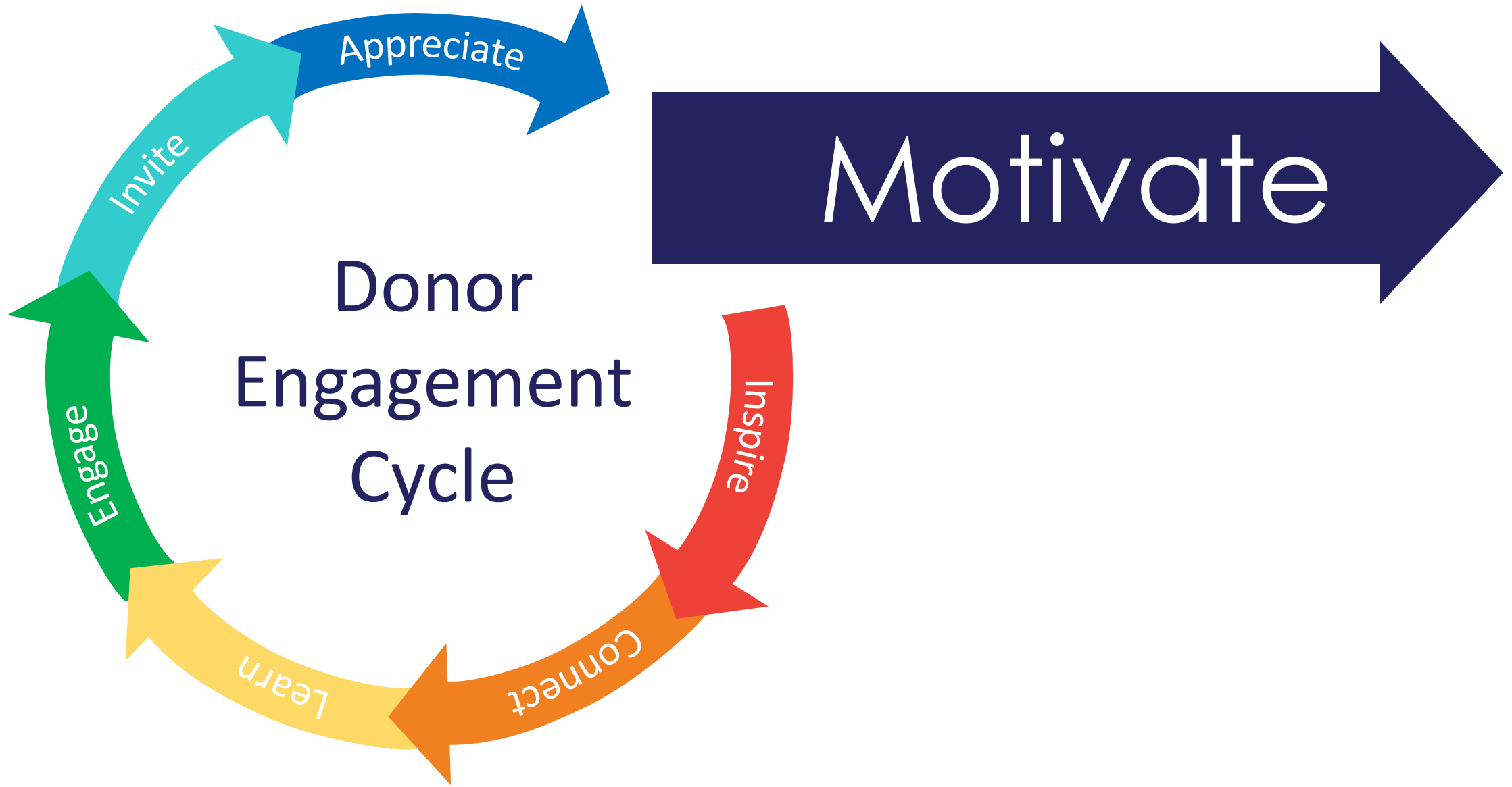
Appreciate – Attitude of gratitude

- Personal and immediate thank you's
- Physical naming opportunities
- Appreciation events
- Special deliveries
- Gift stewardship
 - Reports
 - Meetings
 - Newsletter impact reports

Donor Engagement

Appreciate

Month	Method	Activity	Responsible	Date
Jan	Write	Establish acknowledgement procedure	Washington	1/29/2024
Mar	Research	Investigate new donor wall options	Wong	3/3/2024
Apr	Present	Present new donor wall options to Board of Dir	Wong	4/16/2024
Apr	Create	Create schedule for stewardship meetings	Washington	4/29/2024
Apr	Create	Create schedule for stewardship reports	Washington	4/30/2024
May	Write	Write newsletter impact article	Washington	5/19/2024
Jun	Present	Stewardship report for Board of Directors	Wong	6/16/2024



Motivate – Their life's mission

- Leadership opportunities
 - Board of Directors
 - Event Hosts
 - Campaign Chairs
- Advocacy
 - Speakers
 - Visiting politicians
- Planned giving

Donor Engagement

Motivate

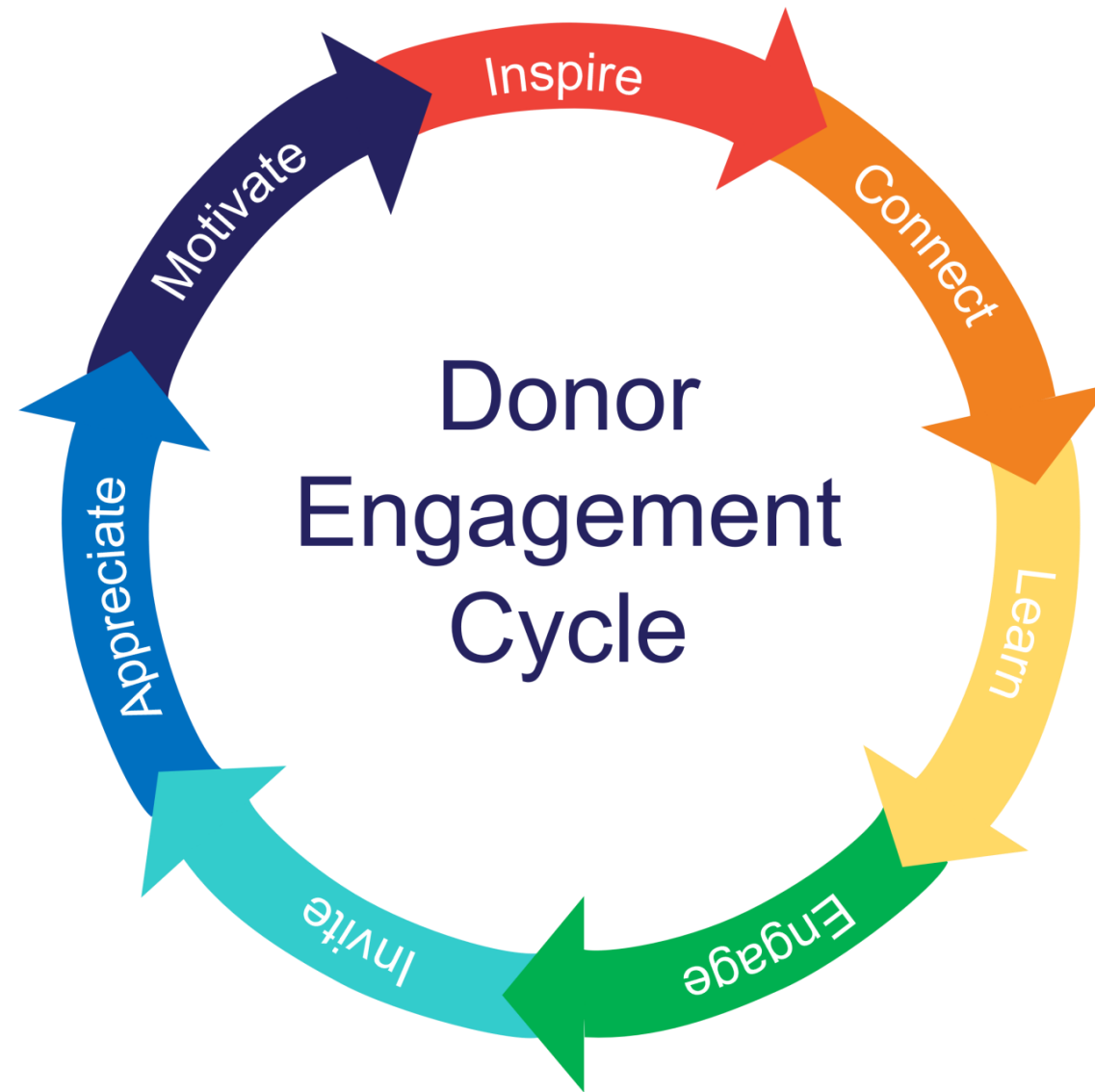
Month	Method	Activity	Responsible	Date
Jun		Identify potential two new board prospects	Board of D	6/2/2024
Jul		Schedule interviews with board prospects	Board of D	7/19/2024
Aug		Identify gala hosts	Wong	8/8/2024
Aug		Train new board members	Burns	8/20/2024
Oct		Identify legacy giving prospects	Wong	10/1/2024
Oct		Schedule meetings with legacy gift prospects	Wong	10/15/2024
Nov		Board report for legacy gifts	Wong	11/16/2024
Dec		Identify 2025 Annual Campaign Chairs	Wong	12/1/2024

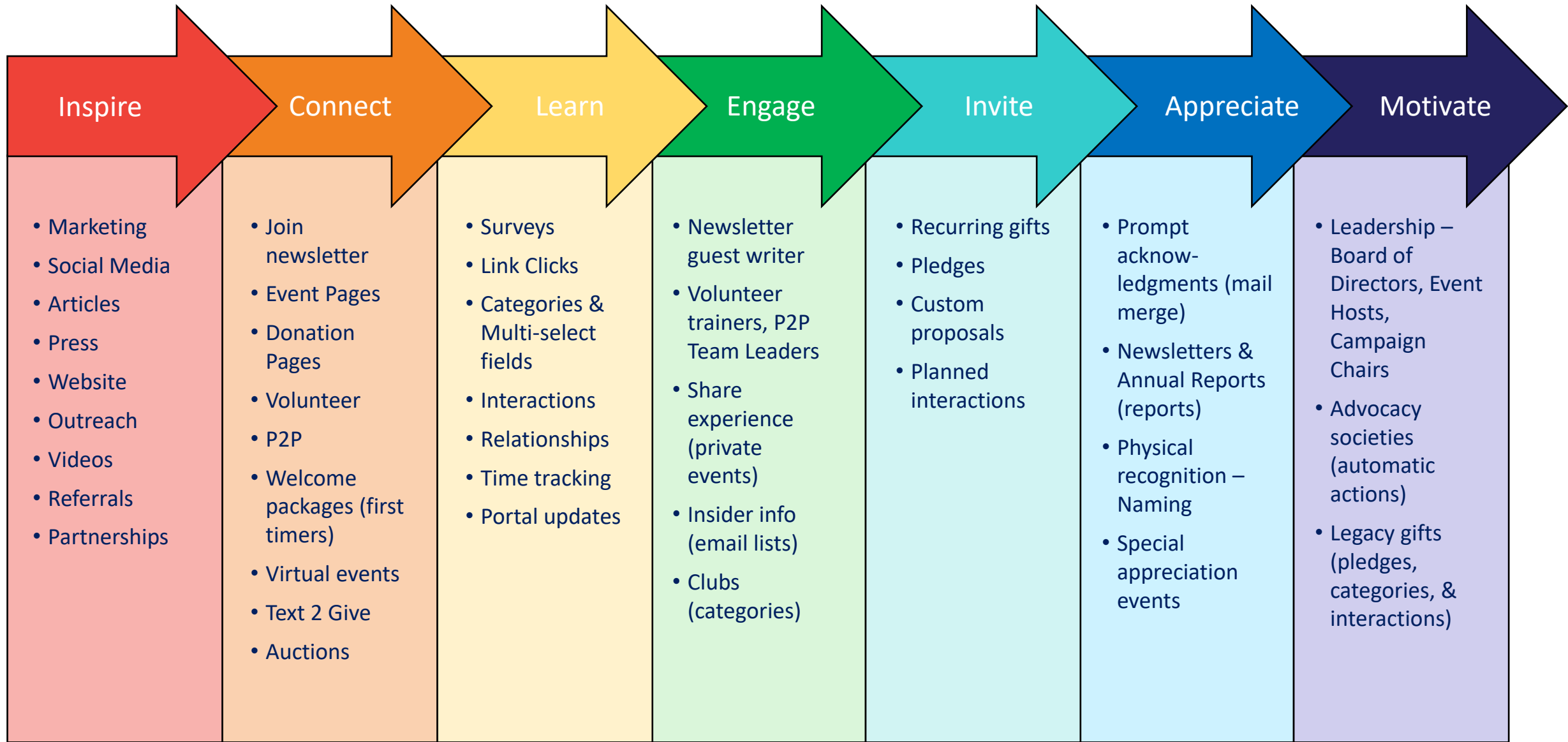
Donor Engagement– Calendar



Annual Fundraising Plan Calendar

Calendar				
Month	Method	Activity	Responsible	Date
Apr	Meet	Confirm County School Board partnership renewal	Washington	4/17/2024
Apr	Meet	Meet with Bixby Gym	Washington	4/23/2024
Apr	Review	Donor Research Report	Wong	4/23/2024
Apr	Write	Write May social media posts	Jenkins	4/26/2024
Apr	Create	Post new summer camp event sign up page	Garcia	4/26/2024
Apr	Schedule	Schedule May social media posts	Jenkins	4/27/2024
Apr	Submit	Press release for 5K race	Jenkins	4/29/2024
Apr	Pitch	Local news feature for 5K race	Jenkins	4/29/2024
Apr	Create	Create schedule for stewardship meetings	Washington	4/29/2024
Apr	Contact	Identify potential outreachs for summer & fall	Incal	4/30/2024
Apr	Create	Create schedule for stewardship reports	Washington	4/30/2024
May	Review	Review April SM analytics and update reports	Jenkins	5/1/2024
May	Submit	Press release for summer camp	Jenkins	5/1/2024
May	Post	Blog for summer camp	Jenkins	5/2/2024
May	Email	Invite new members to subscribe to blog	Jenkins	5/5/2024
May	Outreach	Gold Coast HomeBuilders Association	Incal	5/6/2024
May	Mail	Send invites for cocktail party 1	Jenkins	5/9/2024
May	Train	Train P2P team leaders	Allreden	5/9/2024
May	Review	Ensure all constituents have category	Mendez	5/11/2024
May	Phone	Call to follow up for recurring gift invitations	Washington	5/12/2024
May	Meet	Meet with Jobs Corp	Washington	5/13/2024
May	Create	Post annual golf registration page	Garcia	5/19/2024





Next Steps

Download the free Fundraising Plan Excel worksheets

[Donorview.com/AFPwebinar](https://donorview.com/AFPwebinar)

Register at AFP Global for next webinars

December 6th - “Measuring and Evaluating the Results of your Fundraising Strategy and Plan with KPIs”

THANK YOU!



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Questions?