



Raise[®]

2024

Rethinking Stewardship to Create Better Donor Experiences

(or why the current model is broken and
how to fix it)

Presented by:

Barbara O'Reilly, CFRE
Principal

Nicholas Kristock
ED of Fleece & Thank You & CEO of KindKatch



Windmill Hill
CONSULTING







Nice to meet you!

Barbara O'Reilly, CFRE
Principal



Nicholas Kristock
ED of Fleece &
Thank You & CEO
of KindKatch

Rethinking Stewardship to Create Better Donor Experiences

(and the practical steps to bringing this to life TODAY)

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Where We Are Headed

Raise[®]
2024

WHAT



HOW







From 2-star brasserie to World's Best Restaurant in 11 years through
Unreasonable Hospitality



But, we're not in the
hospitality business.

“

Creating a culture of hospitality means making the people who work for you and the people you serve **feel seen and valued**; gives them a **sense of belonging**; makes them feel **part of something bigger than themselves**; makes them **feel welcome**.

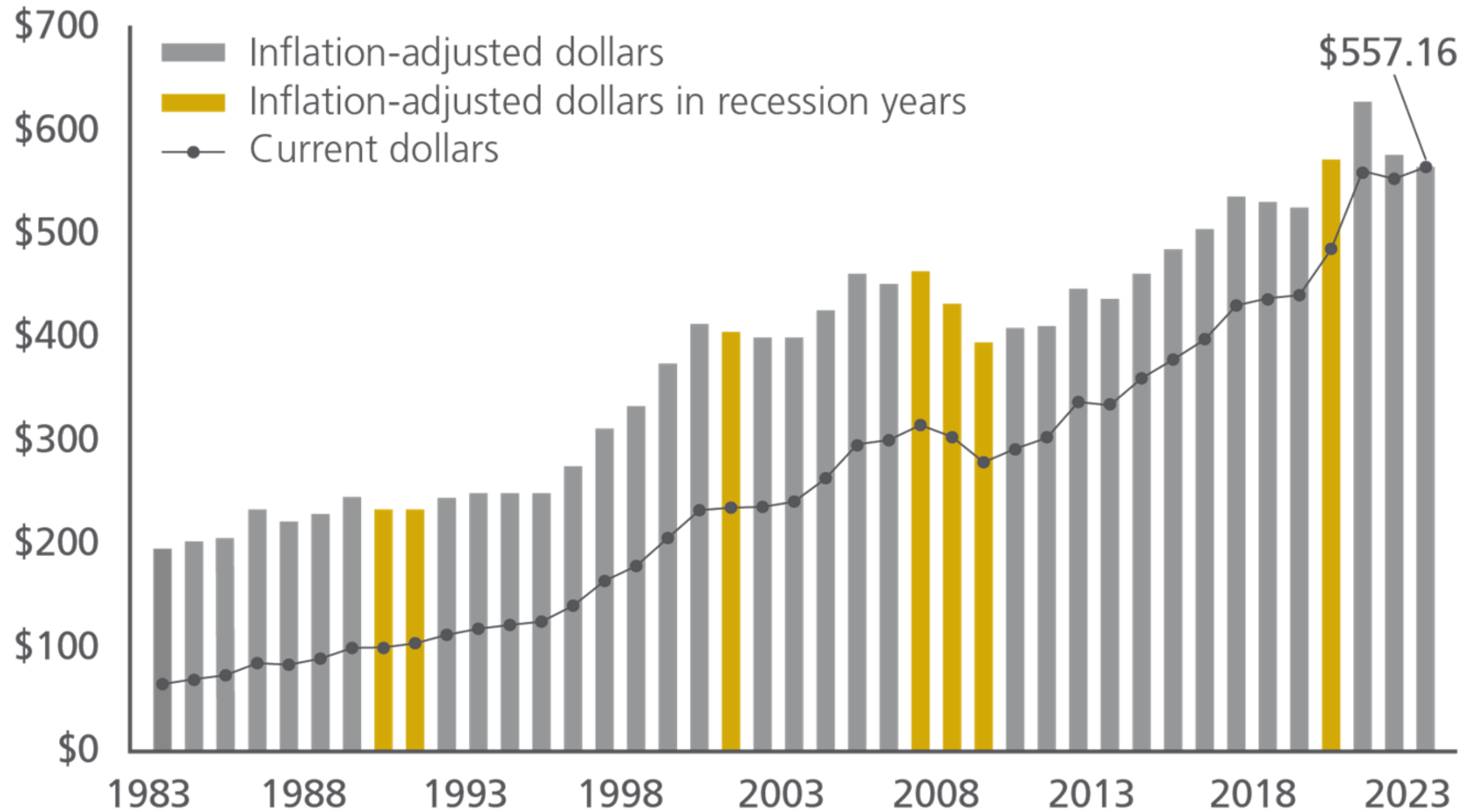
”

- Will Guidara

Unreasonable Hospitality



Philanthropic Context



Source: Giving USA 2024 Annual Report

TOTAL GIVING, 1983-2023

(In Billions of Dollars)

But while giving generally remains strong, under the surface...



20%

Number of Donors

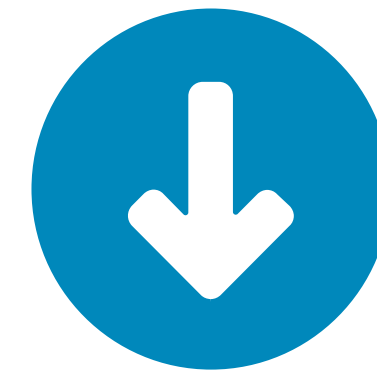
Total giving amount increasing but number of donors has decreased by 20% since 2000.



25%

Donors < \$500

Donors < \$500 shrank by about 25% since 2020. (represents 83% of donors generally)



43%

Average Donor Retention rate below 50% for at least a decade.

And yet...people are still generous... but not only to nonprofits.



\$183 million into DAFs and \$41 billion out of DAFs in 2022



83% of people worldwide donated in one way or another

57% gave to all formal charities, informal groups, and individuals

Donors Seek Relationships and Community

GoFundMe

\$15 Billion
and counting



Facebook Fundraisers



\$7 Billion
and counting

62% of nonprofits use
peer-to-peer fundraising,

with 82% of organizations finding it
effective for raising funds and
engaging supporters.



Giving Circles
Growing

4,000 groups
370k donors
\$3.1 billion granted



Scourge of Loneliness

We need a social revolution to deal with the growing problem of isolation

Several past great things that happen slowly and imperceptibly when, how they can be broken, we would surely demand that something be done. For example, the discovery that up until the 1950s, food was poisonous to people was very slow and that guided us to better nutrition. Newspapers would be shut down when they were no longer needed for work or when the public could read and they might even be a public enemy.

But when the cause of illness and early death is not obvious and the responsibility more difficult to see through the disease and the industry we don't see it or don't see it to be taken seriously. For although yesterday was the beginning of a new era, we are beginning to see the beginning of a new era, a new era of health and well-being, the new era of health and well-being.

The beginning...

Warning: loneliness as bad for your health as tobacco

Loneliness is as bad for your health as smoking tobacco, according to a new study by researchers at the University of Warwick. The study found that loneliness is a major risk factor for heart disease, stroke, and depression.

Lonely Nation. It's Time to Fix That.

The New York Times

Surgeon General: We Have Become a Lonely Nation. It's Time to Fix That.

By Vivek H. Murthy

MENTAL HEALTH AWARENESS MONTH

SURGEON GENERAL DECLARES LONELINESS EPIDEMIC



HELP DESK | [Tech in Your Life](#) | [Future of Work](#) | [Your Data and Privacy](#) | [Internet Access](#) | [What's New](#) | [Ethical Issues](#) | [Ask a Question](#)

Technology's role in the 'loneliness epidemic'

Are tech companies helping the lonely or taking advantage of them?



By Vivek H. Murthy

Updated May 21, 2023 at 10:00 a.m. EDT | Published April 21, 2023 at 10:00 a.m. EDT



FINANCIAL TIMES

Are we ready for the approaching loneliness epidemic?

By Federica Cicco



MSNBC

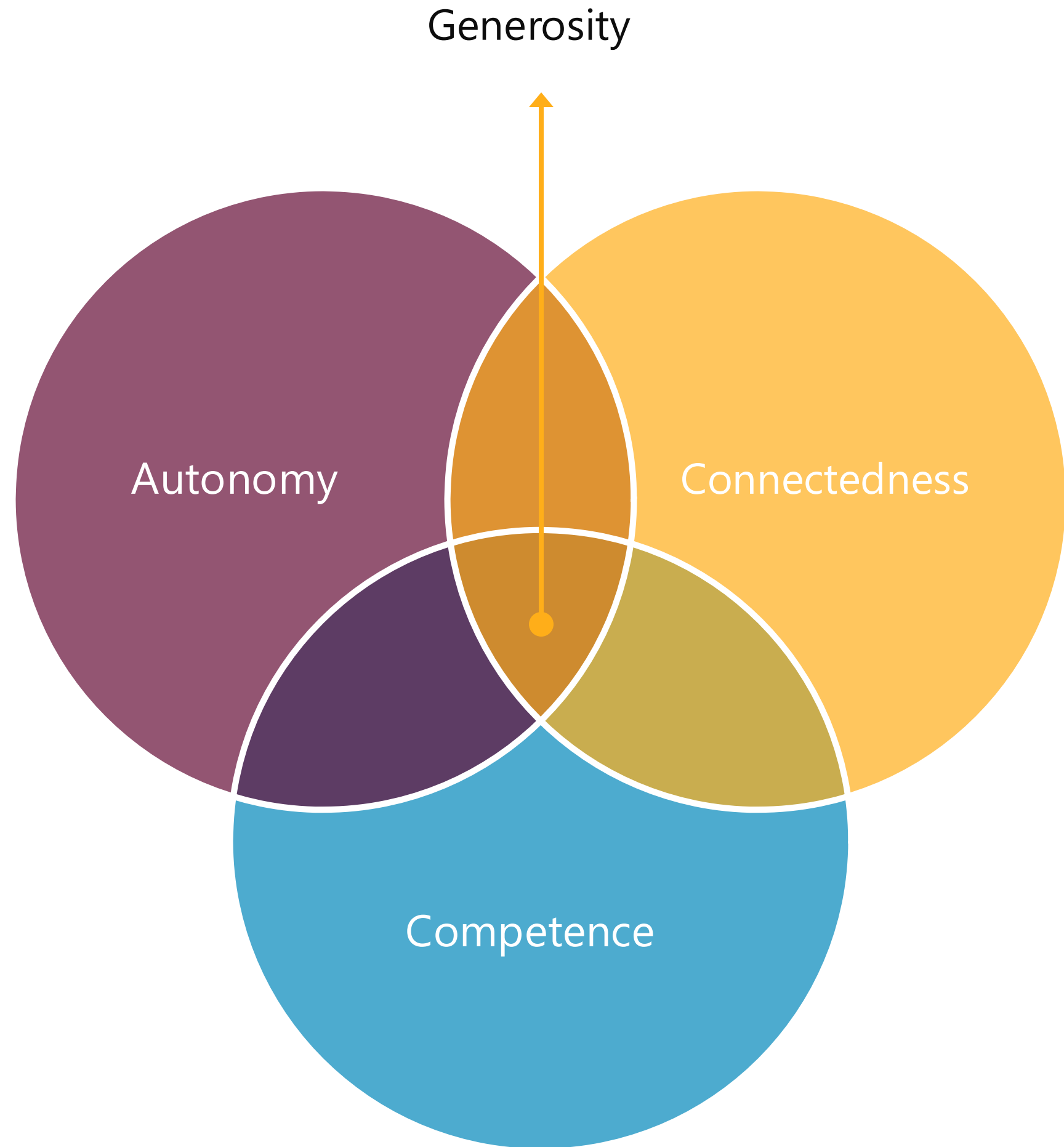
MSNBC
starting at 9

A close-up shot of a man's face, likely from the movie 'Apollo 13'. He has a serious, slightly worried expression, looking upwards and to the right. The background is dark and out of focus. Overlaid on the right side of the image is the text 'HOUSTON, WE HAVE A PROBLEM!' in a large, bold, white font with a black outline.

**HOUSTON,
WE HAVE
A PROBLEM!**

APOLLO 13

What Drives Donors?



Ideal Self

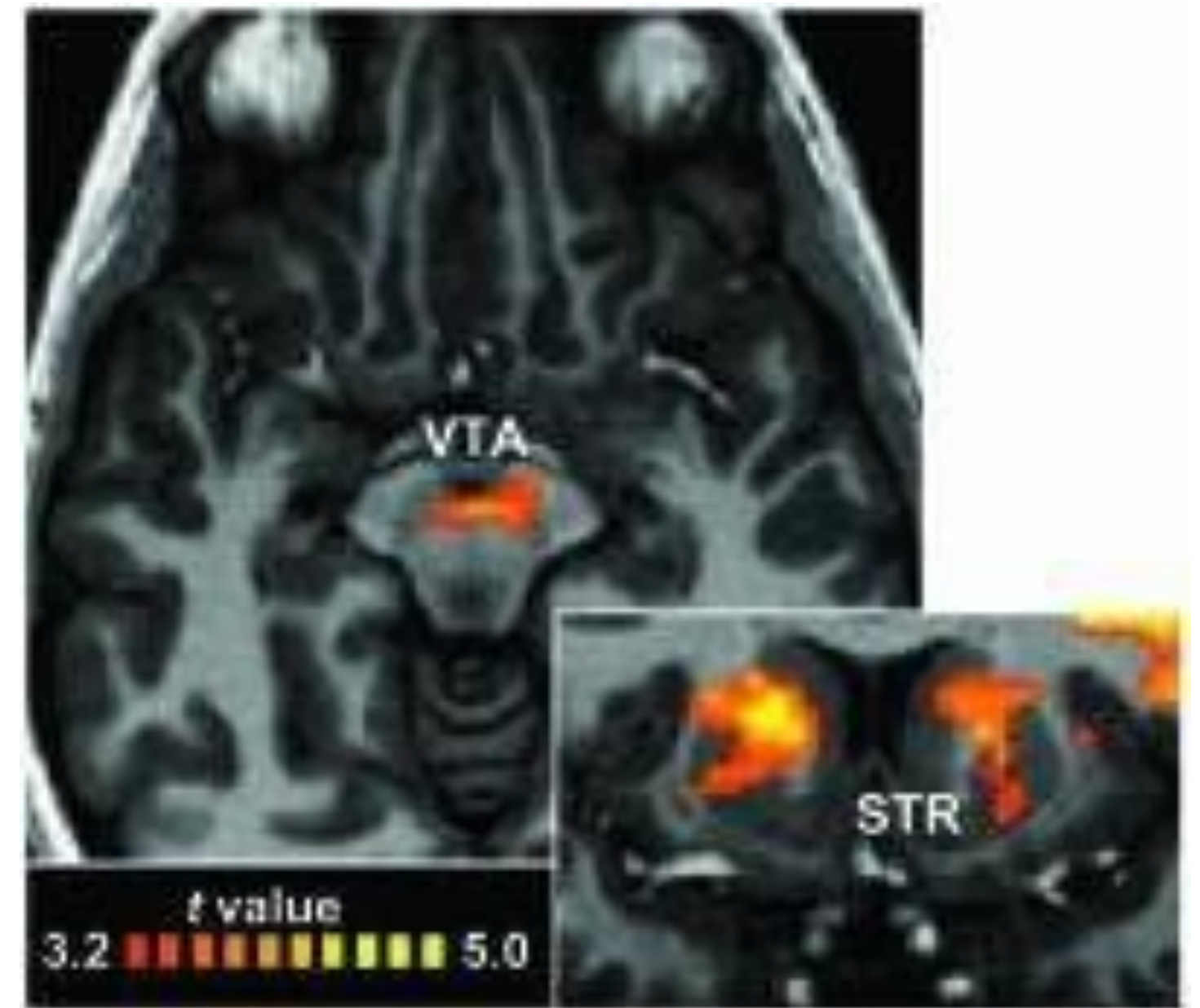
Who we realize we are meant to be (generous, kind, compassionate, activist, etc.) drives the actions we take to become our ideal selves.



Charitable giving is rewarding

(like receiving money)

- It uniquely involves oxytocin rich social attachment brain regions. (used in maternal and romantic love)
- Philanthropy is a “social act” that creates bonding. (a “synthetic family” with other donors)



**If we feel good about
giving already...**



Does Stewardship Really Matter?

What Research Tells Us



Prompt, meaningful gift acknowledgment



Designation of gift to a program, service or project more narrow in scope than the charity's overall mandate



Measurable results on the last gift before being asked for another one

What Research Tells Us



More Money
More Donors Kept
More Upgraded Giving

Prompt, meaningful
acknowledgment

Service or project
more narrow in scope than
the charity's overall
mandate

Measurable results on the
last gift before being asked
for another one

“ Stewardship is about making people feel the best about what they have done so that they can be most motivated to do it again, or even to do something better.

- Sargeant and Shang
The Power of Thank You



“**We were not just in the business of
serving dinner.**

We were serving memories.”

- Will Guidara

Unreasonable Hospitality

- Ideal donor experience is one in which
- How do you want the donor to feel?
- What is needed to create that ideal donor experience?

All Roles Play a Part in Experience



New People
(the "disruptors")



Old Guard
("we've always done it this way")



Front of House



Kitchen

Mindset Shifts Around Roles Are Essential



Front-line
Fundraisers



Boards/Executive
Leaders



Everyone else at the
organization



Development
Operations

Processes Put Stewardship As A Core Value



Donor Experience as
Driver for All
Touchpoints



Donors as People Not
Just Contributions



Systems and
Infrastructure
Not Just Wings
and Prayers

“

Instead of thinking about “stewardship” as what follows a gift, what if we reverse engineered to create the best possible donor experience so they can reach toward their ideal self?

”

HOW DO WE GET STARTED?



**NonDonor
Interaction**



**New Donor
Interaction**

“Isn’t that a little obvious?”

- Skeptical audience member

NonDonor
Welcome Series



**Non-Monetary
Interaction**

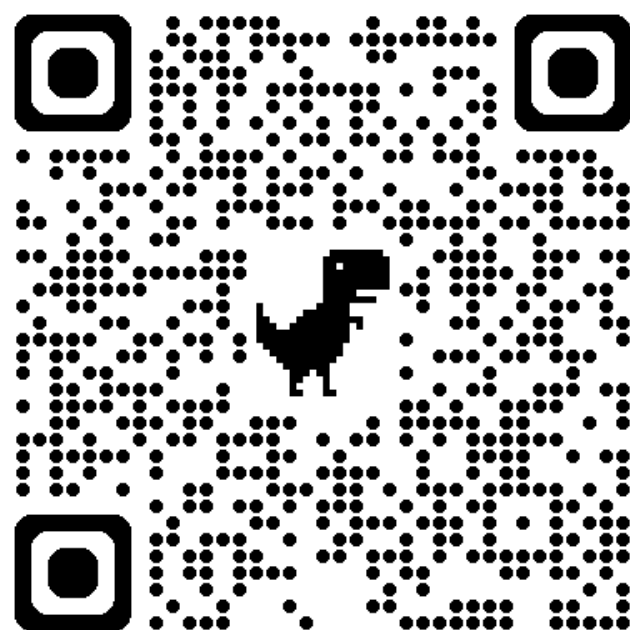
New Donor
Welcome Series



**General
Support/Donation**



Let's Build Your Journey Map



Follow along with our template and build the start of your master donor journey

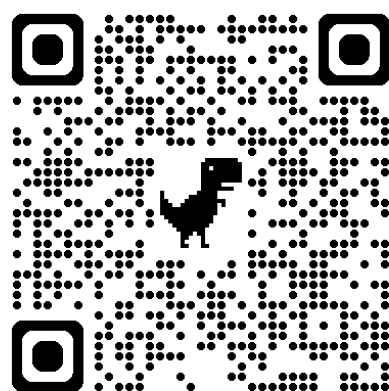
1. List Interactions

List every place or moment you have a non-monetary interaction with a contact

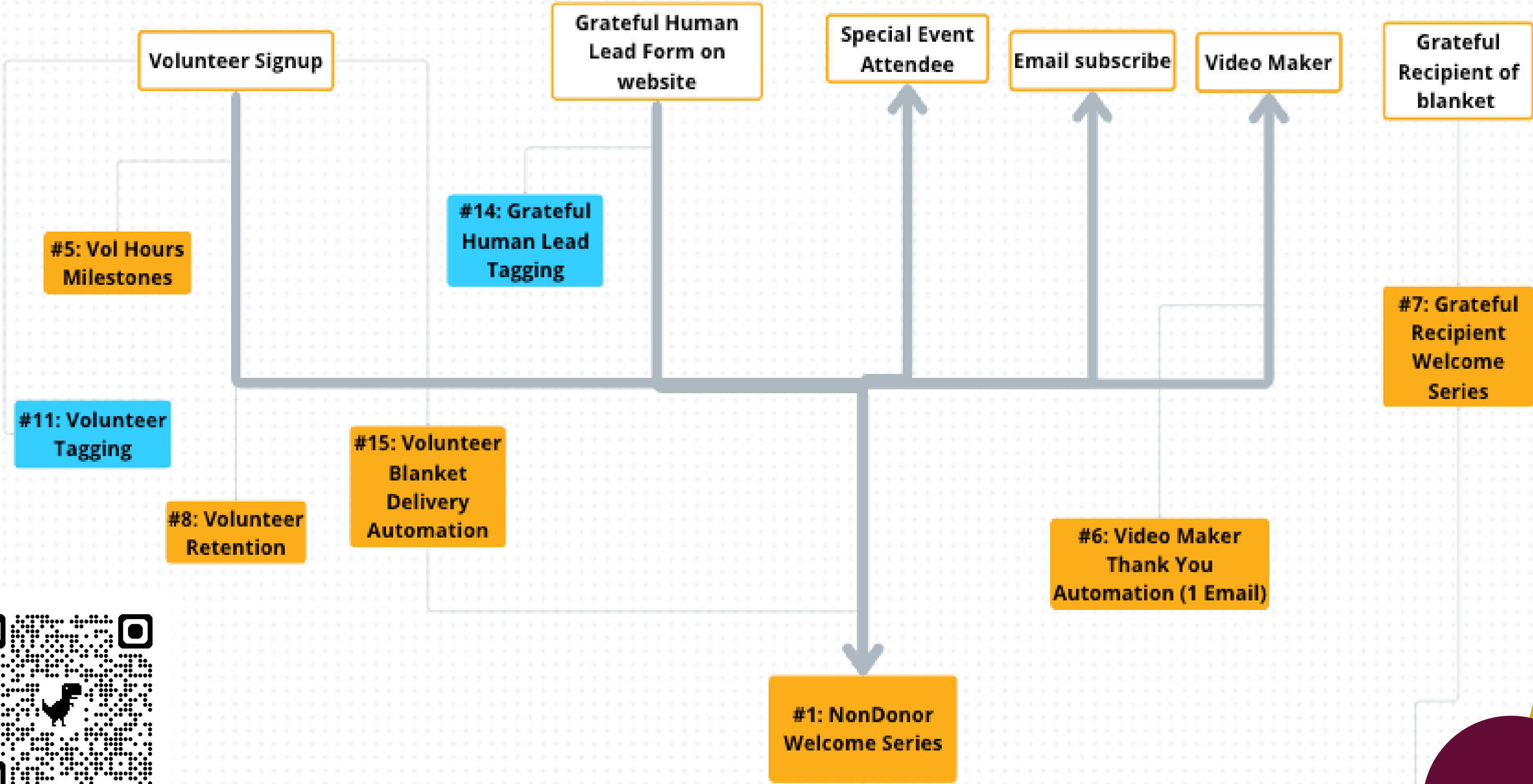
Newsletter Signup | Event Registration | Volunteer Signup | Apparel Order | Special Event Attendee

1. List Interactions (email subscribe, volunteer signup, etc)

Five empty rounded rectangular boxes for listing interactions.



Real Example from:



“Okay so how do I do that?”

- Running out of patience



1. List Interactions

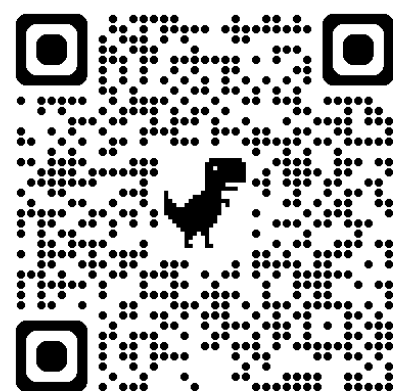
List Interactions: List every place or moment you have a non-monetary interaction with a contact

Newsletter Signup | Event Registration | Volunteer Signup | Apparel Order | Special Event Attendee

2. Create Map

Create Series: From each point of interaction, map out a series of communications. Identify areas of overlap and query accordingly

Call | Email | Text | Video | Letter | Thank You Gift



NonDonor Welcome Series Example from:



Delay: 5 Days

Email 1: Welcome/About Us

Delay: 7 Days

Email 2: Success Story (Video)

Email 3: Ways To Get Involved



1. List Interactions

List Interactions: List every place or moment you have a non-monetary interaction with a contact

Newsletter Signup | Event Registration | Volunteer Signup | Apparel Order | Special Event Attendee

2. Create Map

Create Nondonor Welcome Series: From each point of interaction, map out a series of communications. Identify areas of overlap and query accordingly

Call | Email | Text | Video | Letter | Thank You Gift

3. Insert Ask

Time the Ask: Strategically insert the places you want to “make an ask”

NonDonor Welcome Series Example from:



Delay: 5 Days

Email 1: Welcome/About Us

Delay: 7 Days

Email 2: Success Story (Video)

Delay: 5 Days

Email 3: Ways To Get Involved

Delay: 4 Days

Email 4: Small Gift Ask

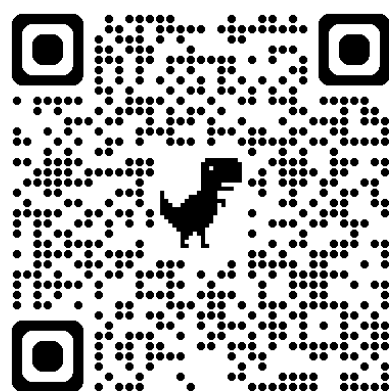
← "The Ask"

Delay: 6 Days

Email 5: Success Story 2 (Video)

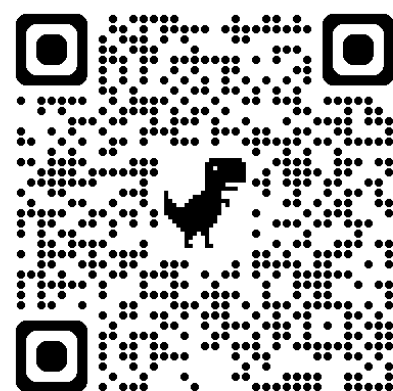
← Clarify How We Communicate

Email 6: What To Expect From Here



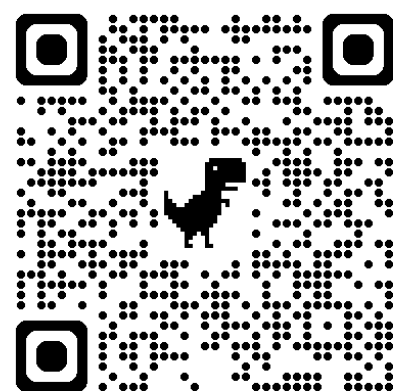
“Bah! No gift.”

- disappointed student



“Bah! No gift. Now what?”

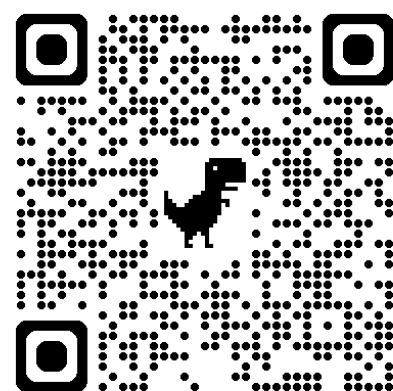
- forward thinking person



Newsletter

***Future Fundraising
Campaigns***

***Special Event
Invites***



“Yay, they donated! Now what?!”

- forward thinking person



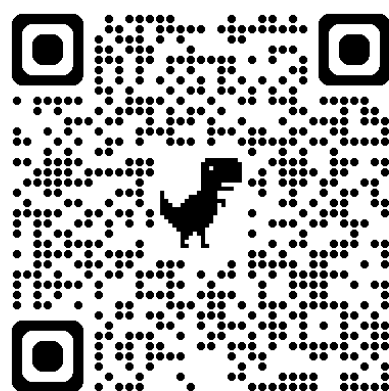
New Donor
Welcome Series



**General
Donation/Support**



**Ongoing/Sustaining
Giving**



Donor Journey Worksheet

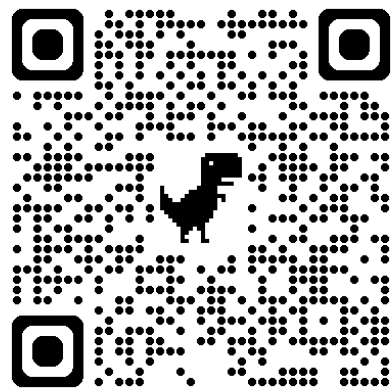
Real Example from:



Email: Simple Thank You



Donation Receipt
Auto Send



Real Example from:



Quick thank you

➤ Inbox x



Nich Kristock

to me ▾

11:49 AM (0 minutes ago)



Hello Nicholas!

I was looking at our recent donations and saw your name pop up. Thanks so much for your recent gift of \$25.00, it really means so much that you would support our mission.

I try to make it a point to do a quick reach out to every first-time supporter of our mission.

It is so important to me that you can see the confidence your gift inspires for our team to continue our hard work every day, and we take very seriously that fact that you have now made an investment into that work.

We have more communication on its way to you, but for now I just wanted to drop a quick email to say thank you for your generosity.

I promise you that we will show up every day and work as hard as we can to turn your gift, your investment, into impact in the form of consistent comfort and connection for our kiddos in the hospital.

Hope you are well, and I look forward to earning your trust as we continue to keep you involved.

Always grateful,

Nicholas

--

Real Example from: 



Delay: 2 Days

Email 1: Simple Thank You

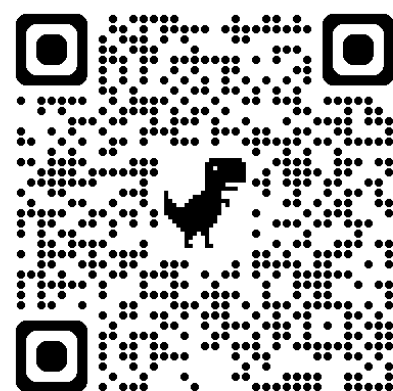
← Donation Receipt Auto Send

Email 2: Donor Promise

← Weekly Call List

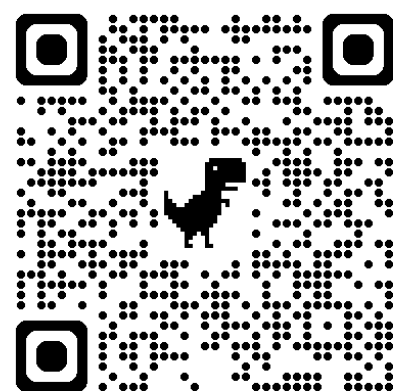
“Wait, so you call every donor?!”

- skeptic is back



“What if I told you, yes, we do?”

- me



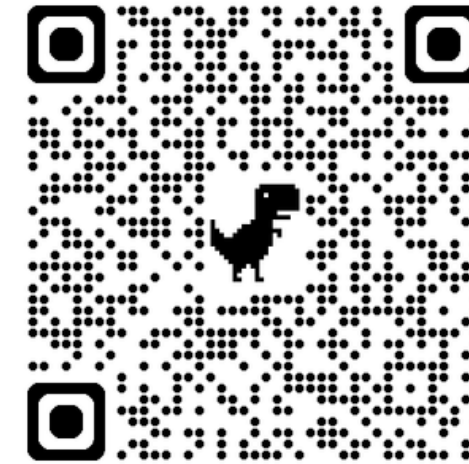
“No way. How?”

- skeptic pt III



DONOR SWAT OUTREACH TEAM

- 2-12 Individuals
 - Staff
 - Board
 - Key Volunteers
- Weekly Call Assignments
- Note Tracking for Important Follow Ups
- Provide Call Script



**DONOR SWAT
OUTREACH TEMPLATE**

Owner	Owner Notes	Contact Name	Amount	Gift Date	Contact Primary Mobile Phone	Contact Primary Home Email	Notes	Life To Date Giving
Dave Smith	Emailed 10/2/2023	Saige Fuentes	\$300.00	7/13/2023	(307) 555-9214	saige.fuentes92@emailpro.com		\$2.00
Asha Jones	Called, did NOT leave VM. Going to try back tomorrow because I'm hoping to speak with her.	Bowen Higgins	\$176.05	9/16/2023	(832) 555-6701	bowen.higgins@quickmail.net	Nancy@fleeceandthankyou.org if you can do some diggin here. She made this same size gift a year ago...would love to learn the motivation!	346.35
Asha Jones	Spoke with Randy. Randy is part of the Chamber of Commerce and helped with event	Leighton Kramer	\$120.00	9/25/2023	(415) 555-3089	leighton_kramer75@inboxx.org		
Kai Turner	Left VM on 10/2/2023	Kylan Gentry	\$100.00	9/29/2023	(206) 555-7452	kylan.gentry2024@fastcom.io		
Kai Turner	Left VM on 10/2/2023	Amelie Griffith	\$100.00	9/22/2023	(603) 555-1938	amelie.griffith@mailserve.net		
Dave Smith	Left VM on 10/2/2023	Franklin Sierra	\$60.00	9/28/2023	(719) 555-8567	franklin.sierra@connectmail.com		
Nich Chris	Left VM on 10/2/2023	Marceline Avila	\$60.00	9/12/2023	(484) 555-2103	marceline_avila@swiftbox.org		
Nich Chris	Spoke with Jaylen, she heard about us from a bowling event	Jaylen Blackwell	\$60.00	9/11/2023	(941) 555-5796	jaylen.blackwell@netpost.com		



New Donor
Welcome Series



**General
Donation/Support**



**Ongoing/Sustaining
Giving**

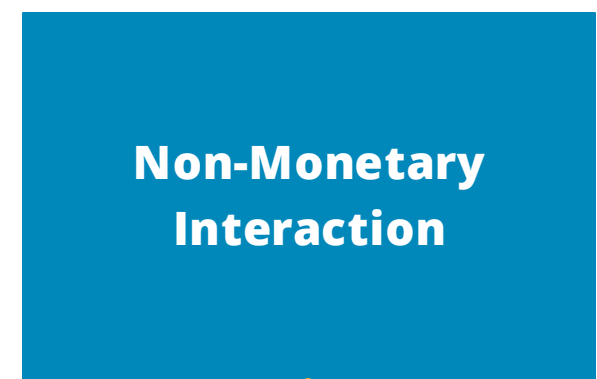


**Formal Recurring
Giving**



Donor Journey Worksheet

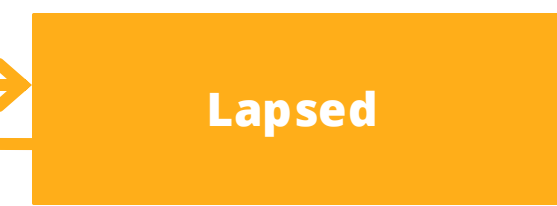
#1 NonDonor
Welcome Series



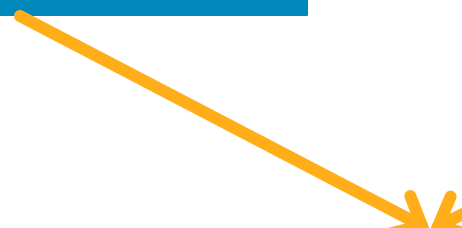
#2 New Donor
Welcome Series

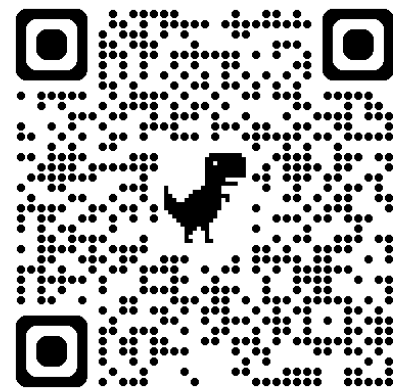
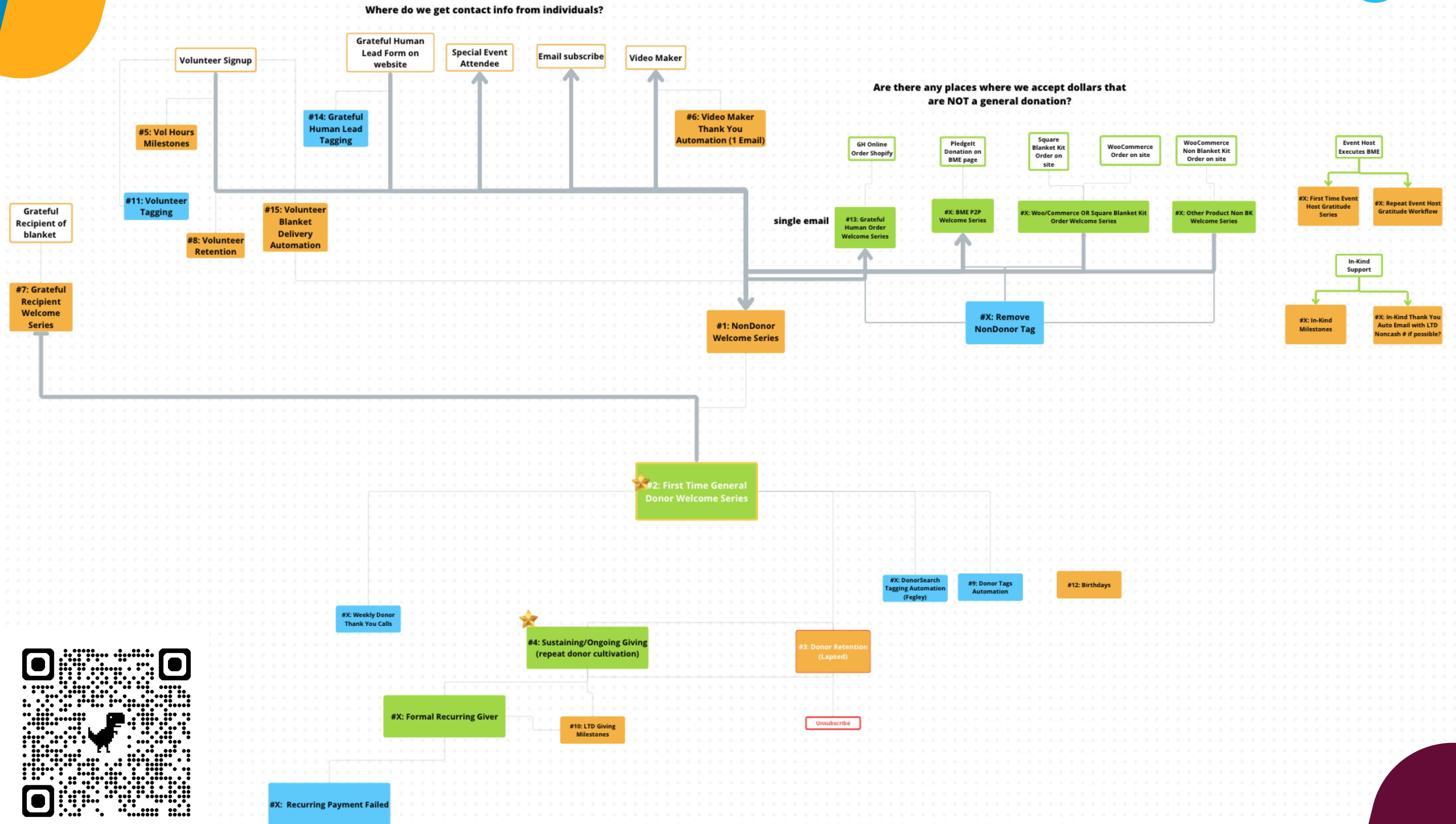


#3 Sustaining Donor
Cultivation Series



#4 Lapsed Donor
Winback Series





“This is a lot.”

- Justified thought

"Start with ONE."

- Nicholas and Barbara

“Didn’t you say something about a bag of chips turning into a major donor?!”

- Person with great memory



“WHOA. Done?!”

- Relieved

Follow Us on Social!



Barbara O'Reilly



Nicholas Kristock



Mastermind
Coaching Cohort



Early Release -The Practical
Guide to Donor Journeys

