PARK COUNTY
COMMUNITY
FOUNDATION

Tuesday Tune-Up:

Donor Appreciation Activities

June 22, 2021

Featuring:

- **Peggy M. Owens, CFRE**
- **Barb Oldershaw**

  Program Director, Park County Community Foundation

GIVE A hoot
Park County Community Foundation's Giving Challenge

Online skill-building workshops to enhance your Give a Hoot outreach.

Park County Community Foundation

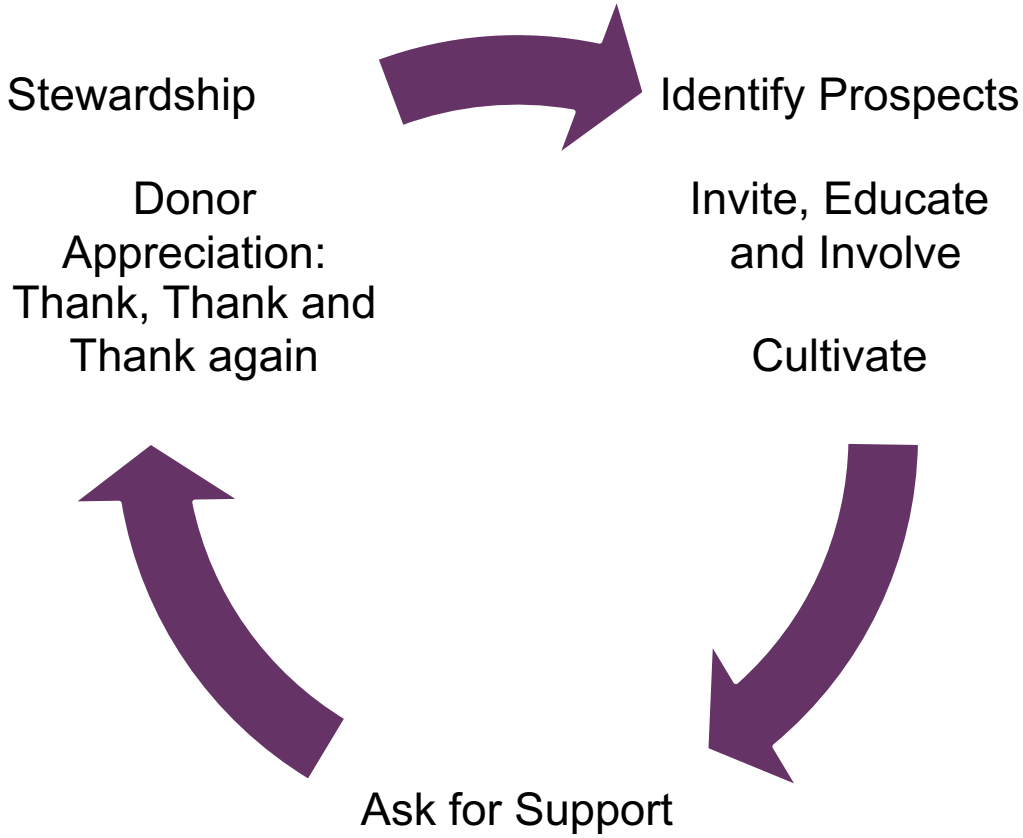
Give a Hoot About Your Donors

Peggy M Owens, CFRE
Barb Oldershaw, PCCF Program Director

Outcomes for This Session

- Understand why donor appreciation is so important
- Consider creative and effective ways to build relationships with your donors all year long, including donor stewardship
- Why it's never too late to thank a donor
- Learn about how to access donor information on the Give a Hoot website

The Fundraising Process



Donor Appreciation Basics: Thank You Letters

- Prompt—written thank you within 24 hours
- Personal—sign. Add a p.s. or note
- What their gift will do! (not what you will do.)
- Update periodically

Why Does Donor Appreciation Matter?

- Helps you keep your donors: Retention
- Creates awareness and possibly more involvement and larger gifts
- Stewardship deepens relationships

Focus on Donor Retention

The overall **2020 donor retention rate** was 43.6%, a 4.1% drop from the 2019 **rate** of 45.4%. The chief factor in the decrease was a 9.2% drop in the new **donor retention rate** (the **percentage** of **donors** who gave in 2019 to a charity but didn't give to the same charity in **2020**).

~ Association of Fundraising Professionals, Fundraising Effectiveness Project

Donor Retention Tip

One of the most effective ways to retain donors is for volunteer board members to make thank you calls.

Donors who get a thank you call from a board member are more likely to give again and even increase their gift.

You may have to do some searching for phone numbers. Obtain them when you can. A handwritten note or personal email isn't as effective but may substitute if you don't have a phone number.

Penelope Burk found that a **thank-you call** from a board member to a newly acquired donor within 24 hours of receiving the gifts will increase their next gift by 39%.

~Bloomerang

Donor Awareness Shows That You Care: Communication Basics

- Send donor information 3 times a year; newsletter, Annual Report, special appeals, enews
- Maintain a Facebook page
- Keep your website up to date
- Communications to donors focus on how their gifts are transformational

A Stewardship Calendar is a Simple Plan

Donor stewardship lets donors know how their gift was used. How did they help your group change the world for the better?

What else will you (and your board) do each month or each quarter to inform and inspire your donors?

- Send information—donor welcome packet to first time donors, newsletter with personal note, donor update letter etc
- Donor appreciation event
- Holiday card
- Tour of completed project

Make it personal and about the impact of the donor's gift, not your organization

Approach can be tailored to the size of gift.Do what you can given your organization's capacity

It's Never Too Late to Thank a Donor

Suggestions to consider if you didn't send a thank you last year:

- Call and thank them now
- Acknowledge their gift when you request their support again
- Send them a newsletter or donor update letter with a personal note

Give a Hoot Donor Data

NEXT UP:

Barb will address how to access donor information on the Give a Hoot website

P.S. from Peggy: "Don't forget to thank the Park County Community Foundation for making all this possible!"

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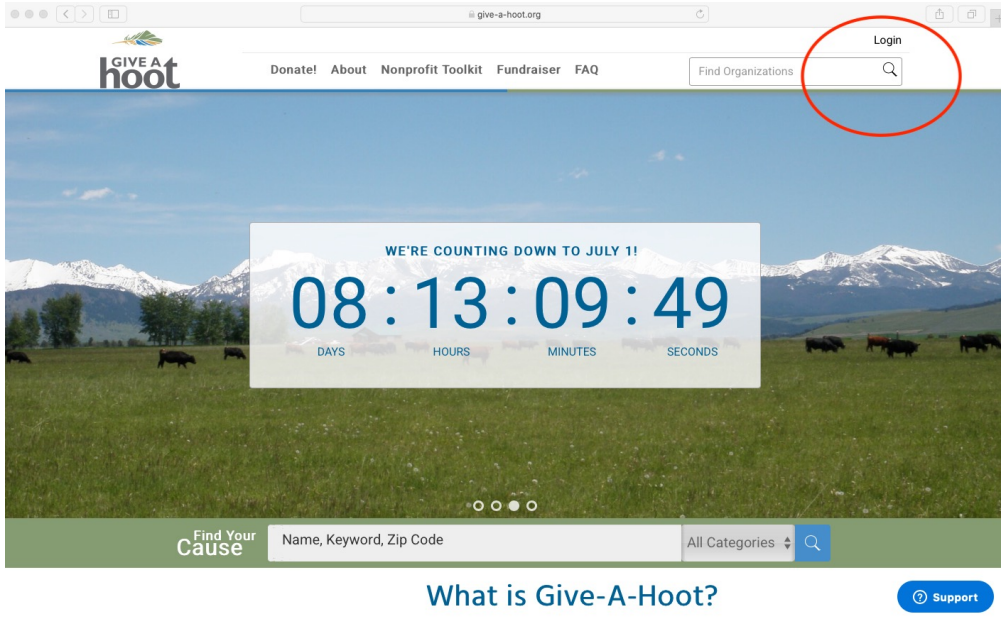
Online skill-building workshops to enhance your Give a Hoot outreach.

Brief tutorial on how to access your donor information from the Give-a-Hoot.org website

If you still have questions afterwards, reach out to:

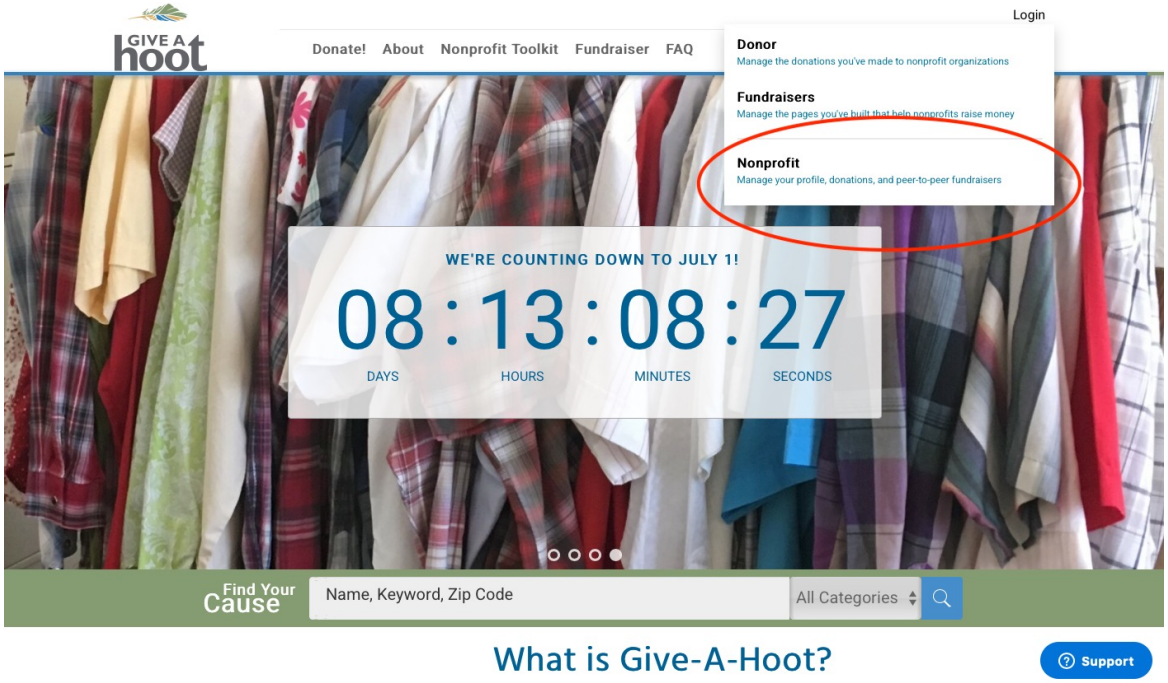
Barb.Oldershaw@pccf-montana.org

1. Navigate to the Give-a-Hoot.org website

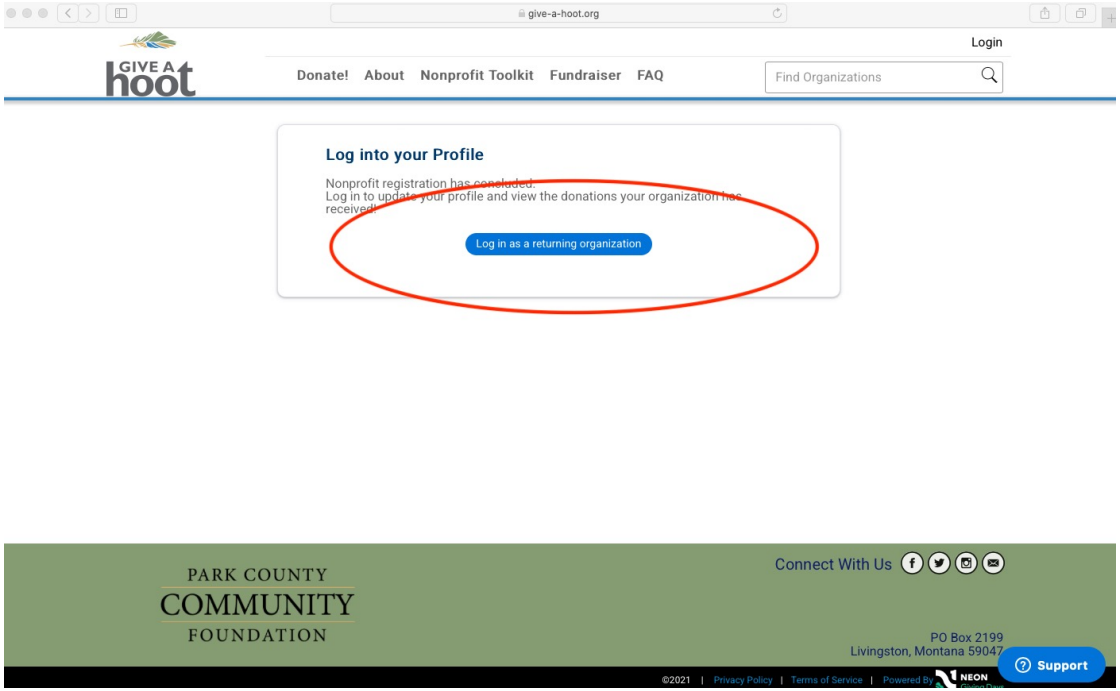


Hover over the part that says “Login” so it brings up the drop down menu that we’ll see on the next slide.

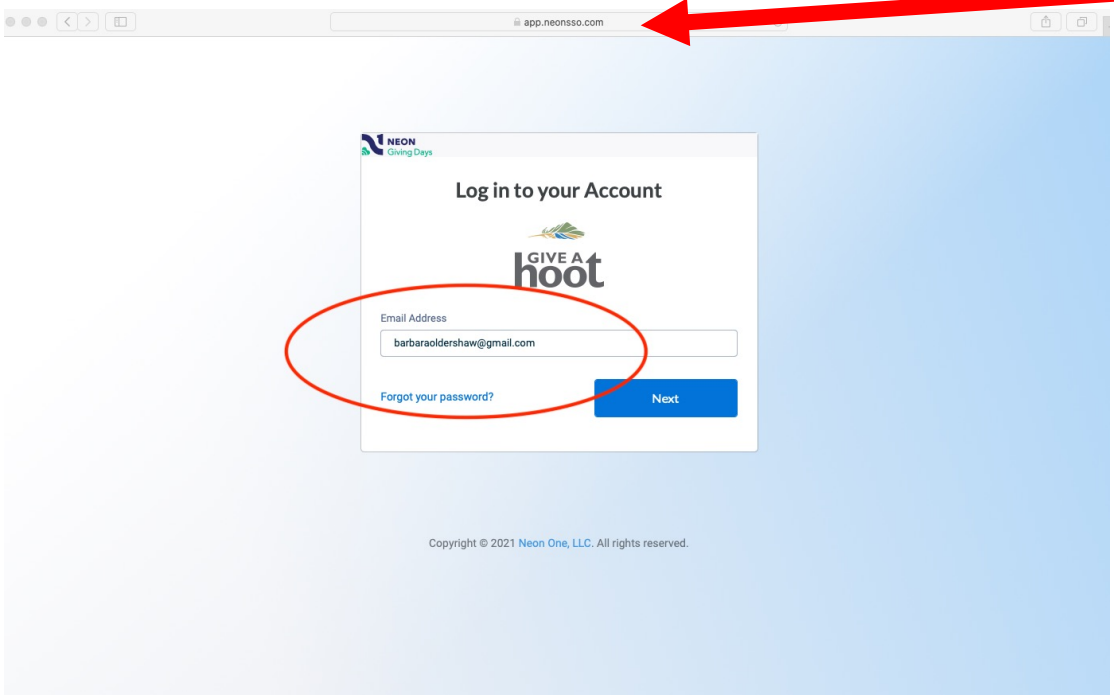
2. You will want to log in as a Nonprofit



3. Click on the blue button that reads “Log in as a returning organization”

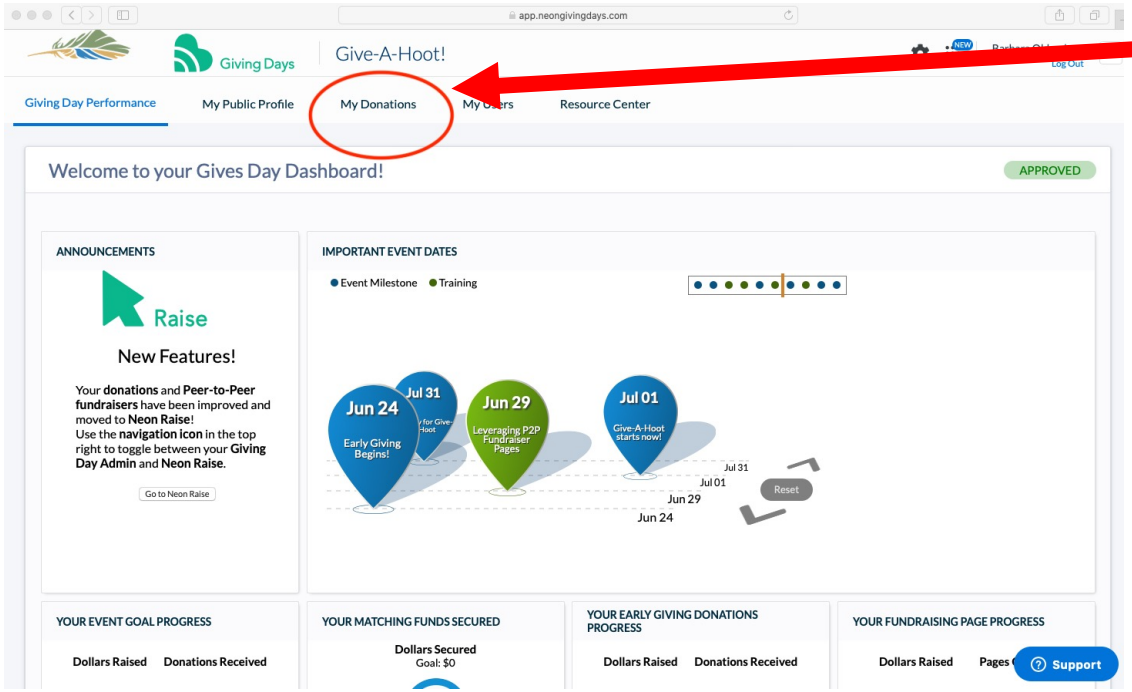


4. Enter the email you used to set up your “User Account” on Give-a-Hoot.org



Note that we just transitioned from the “front end” of the site (AKA, “Give-a-Hoot.org”) to the “back end” of the site, which is hosted by Neon One.

5. You should now arrive at your organizational “Gives Day”* dashboard!



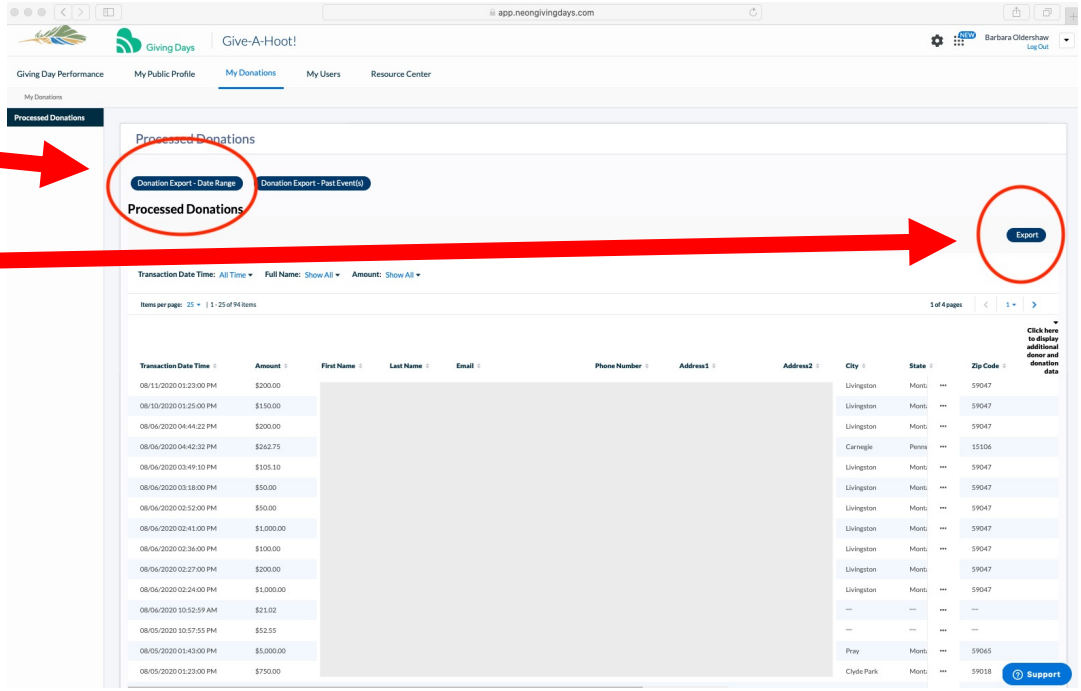
You’ll want to click on the “My Donations” tab to access Donation details

*Note that most of the events hosted by NeonOne only last for a single day, thus they are referred to as the “Gives Day” / “Giving Day”

6. You will now see all donations from all of the Give a Hoot campaigns (2019-2021).

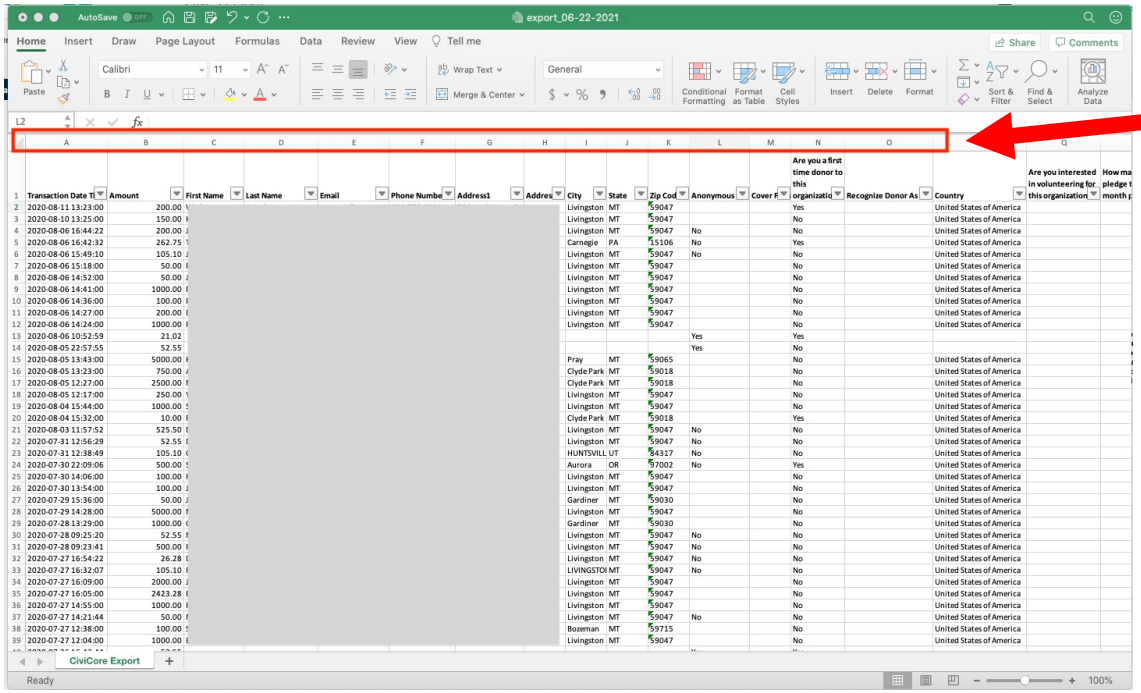
There are two ways to export these details, either by selecting a date range

Or by just clicking “Export” and that will download all of your donations for all 3 years of the Give a Hoot campaign



7. After completing the Export process, you will now have an Excel sheet with all of your donor data!

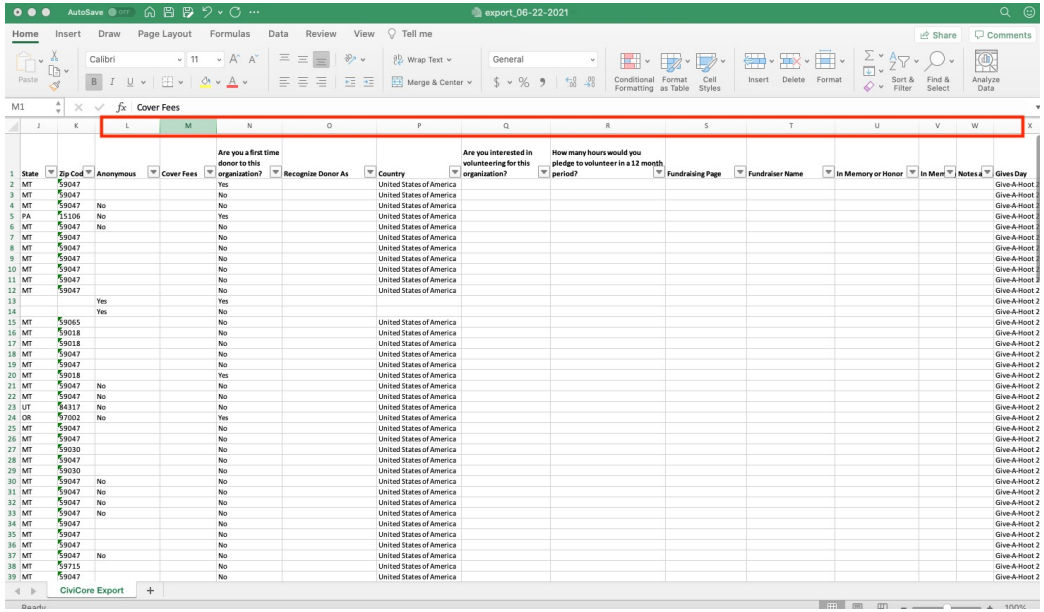
(Identifying details are grayed out on this screen shot, since this is the PCCF donor data)



Be sure to notice that there are multiple columns of info available!

(this slide just shows columns A-O)

Note that there are additional details about your donors that will be available in the Excel download:



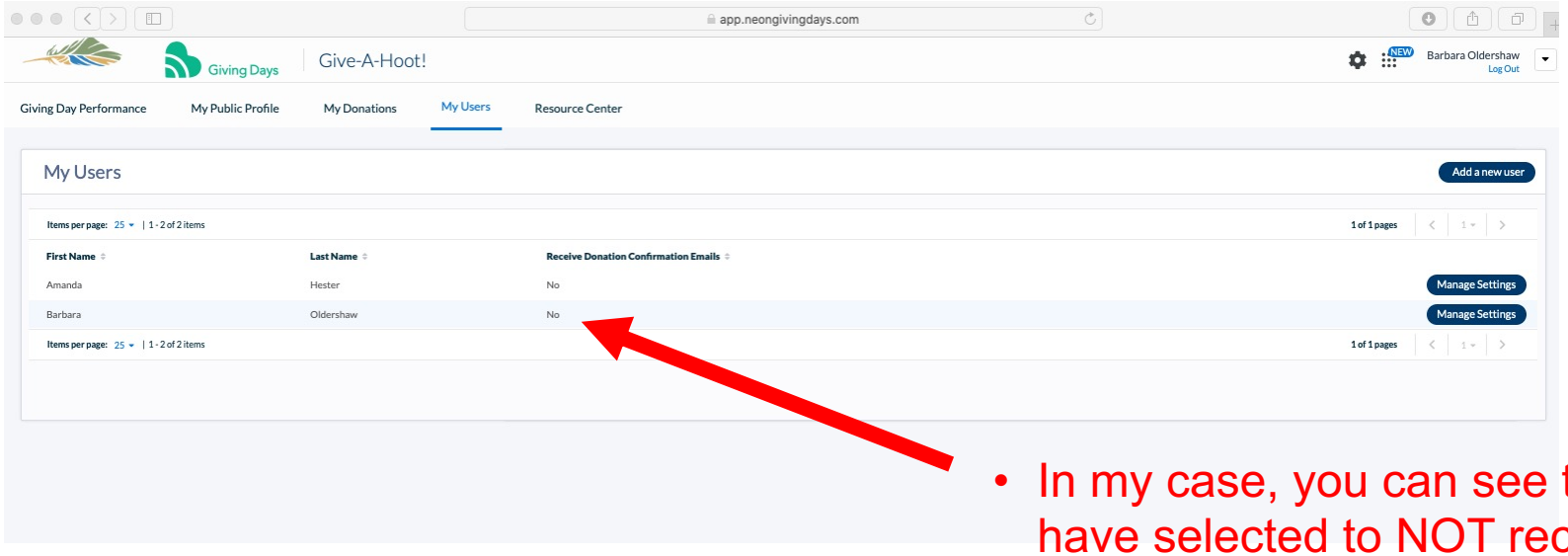
This slide shows columns L - W

Additional details include:

- Did the donor choose to be anonymous?
- Are they a first-time donor?
- Do they want to be recognized by a name other than the name on their credit card? (eg: “The Smith Family”)
- Are they interested in volunteering? If so, for how many hours/12 months?
- Did this donation come in via a Fundraising Page? (ie, a Peer-to-Peer campaign) If so, what is the name of the Fundraiser who created the campaign?
- Is this donation made “In Memory Of” or “In Honor Of” someone?

All of these details provide opportunities to personalize your donor thank you letter!

Note that this info is ALWAYS available on your profile page -- whether or not you choose to receive the Donation Confirmation Emails indicating that a new donation has arrived!

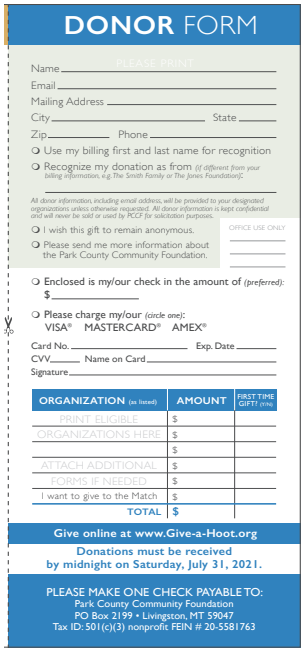


- In my case, you can see that I have selected to NOT receive these Donation Confirmation Emails.
- You can change this setting at any time.

Some background info on how Give-a-Hoot donations arrive in the system:

- If the donor makes their donation via the Give-a-Hoot.org website:
  - They are required to enter their email address
  - They immediately receive a Donation Confirmation Email
  - A representative of your organization immediately receives a Donation Confirmation Email = if that feature has been selected!

- If the donor makes their donation by check:
  - The check (and the 2021 Donor Form) arrive at the PCCF office
  - We enter the information manually through the back-end of the site
  - A representative of your organization immediately receives a Donation Confirmation Email = if that feature has been selected!
  - The Donor immediately receives a Donation Confirmation Email = if they included their email address on the donor form!



DONOR FORM

PLEASE PRINT

Name _____

Email _____

Mailing Address _____

City _____ State _____

Zip _____ Phone _____

❍ Use my billing first and last name for recognition

❍ Recognize my donation as from *(if different from your billing information; e.g. The Smith Family or The Jones Foundation)*:

_____

All donor information, including email address, will be provided to your designated organizations unless otherwise requested. All donor information is kept confidential and will never be sold or used by PCCF for solicitation purposes.

❍ I wish this gift to remain anonymous.

❍ Please send me more information about the Park County Community Foundation.

OFFICE USE ONLY

❍ Enclosed is my/our check in the amount of *(preferred)*:
$ _____

❍ Please charge my/our *(circle one)*:
VISA® MASTERCARD® AMEX®

Card No. _____ Exp. Date _____

CVV _____ Name on Card _____

Signature _____

ORGANIZATION *(as listed)*	AMOUNT	FIRST-TIME GIFT? *(YIN)*
PRINT ELIGIBLE	$	
ORGANIZATIONS HERE	$	
	$	
ATTACH ADDITIONAL	$	
FORMS IF NEEDED	$	
I want to give to the Match	$	
TOTAL	$	

Give online at www.Give-a-Hoot.org

Donations must be received by midnight on Saturday, July 31, 2021.

PLEASE MAKE ONE CHECK PAYABLE TO:
Park County Community Foundation
PO Box 2199 • Livingston, MT 59047
Tax ID: 501(c)(3) nonprofit FEIN # 20-5581763