

Spectacular Donor Stewardship

Lisa Maska, CFRE

Partner, Lautman Maska Neill & Company

Betsy Wason, CFRE

*Vice President for Development,
Physicians Committee for Responsible Medicine*



#bridgeconf

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Today's Discussion

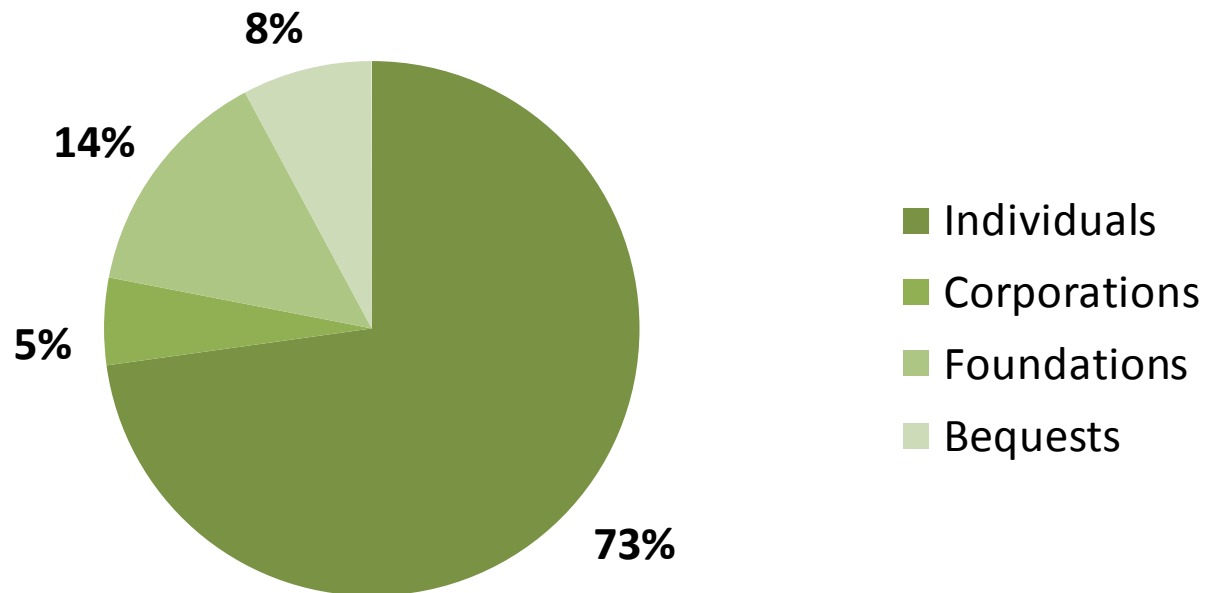
- Introduction
- Case Study: PCRM
- Stewardship Toolbox
- Q&A

It's Tough Out There...

- Many organizations are competing for your donors' attention.
- According to Target Analytics, 67% of donors give to 6+ charities. The average is 13 organizations!
- In this economy, you can't afford to lose the donors you worked so hard to acquire.
- Exceptional donor stewardship is more critical than ever before.

Individual Donors are Key

Individuals Contributed \$290.89 Billion to Charities in 2010!

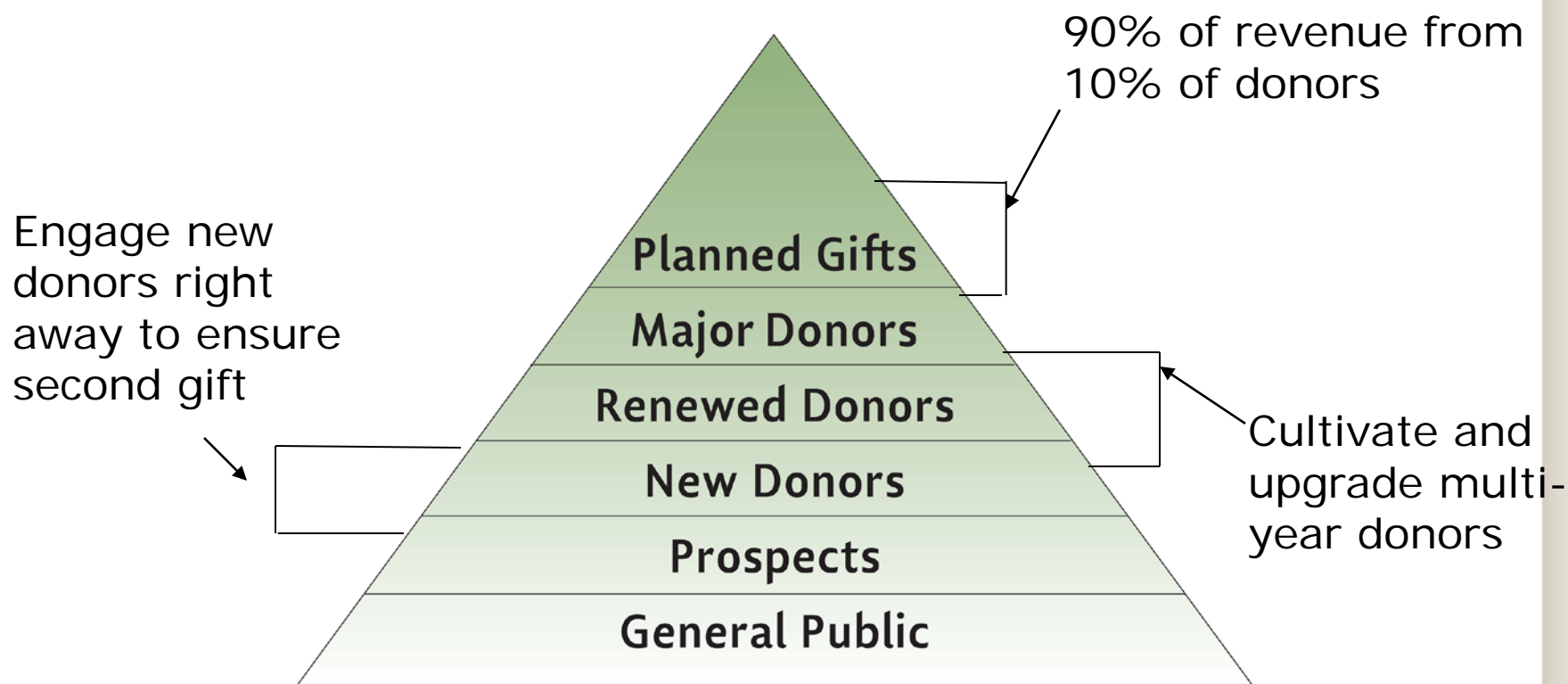


Figures from *Giving USA 2011 (06/2011)*

Donations From Individuals Increased Only Slightly in 2011

- According to *Giving USA*, individual contributions increased by just 0.9% in 2011.
- Federal, state, and local governments cutting back.
- Foundation and corporate giving down.
- Bequests were up – but are hard to control.
- Individual giving was stagnant.

To Get Major and Planned Gifts, Need to Build Up the Donor Pyramid



How Do You Stay at the Top of Your Donors' Charity List?

- Help donors feel excited about supporting you.
- Thank them quickly, and meaningfully.
- Show them how they made a difference!
- Help them to get to know you better.
- Listen to them.
- Thank them unexpectedly – show them how much you appreciate them.
- Make them feel special.

PCRM: A Case Study in Making Donors Happy

Physicians Committee for Responsible Medicine (PCRM)



Founded in 1985, the Physicians Committee for Responsible Medicine (PCRM) is a nonprofit organization that promotes preventive medicine, conducts clinical research, and encourages higher standards for ethics and effectiveness in research.

PCRM Development Program

- 150,000 active donors.
- Multi-channel campaign includes direct mail, online marketing, telemarketing, events, personal solicitation, planned giving.
- Program raises \$11 million annually.
- President Neal Barnard, MD is well-loved by donors.

Guardian Circle (\$1,000+)

- 2005: 164 donors, 433 gifts
- 2011: 296 donors, 657 gifts

Prompt Acknowledgment of a Large Gift

- We call right away!
- *“I JUST learned of your generous gift and wanted to call right away to thank you and tell you how much it means to PCRMM’s work!”*



Assignment of a Personal Contact

- Business card of major gift officer is included with acknowledgment.

President's Quarterly Update Conference Calls

- Invitations by email with phone follow-ups.
- Call is hosted, so callers “check in.”
- For donors who expressed interest, MGO follows up with link to recorded call.
- Strict 30 minute limit – respects busy schedules.

VIP Mailing

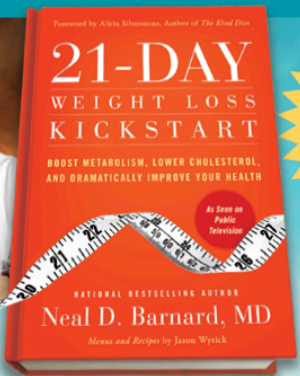
- Quarterly mailing
- Written from Neal's desk
- Includes “insider” information



Time with Neal

- Invitations to meet one-on-one with Neal before his public appearances

Join Dr. Neal Barnard for a *free* Lecture and Book Signing



and take the 21-Day Weight Loss Kickstart challenge!

"Get ready to transform the way you think about food, and get ready to change your life!"
-Alicia Silverstone, author of *The Kind Diet*

Dear PCRM supporter,

Please join PCRM founder and president Neal Barnard, M.D., at one of his upcoming book tour events in Pittsburgh where he will discuss his three-week immersion program into an essentially perfect diet—loaded with vegetables, fruits, and other healthy foods—and sign copies of his new book, [*21-Day Weight Loss Kickstart: Boost Metabolism, Lower Cholesterol, and Dramatically Improve Your Health.*](#)

BOOK TOUR INFORMATION

Pittsburgh
Thursday, July 7, 2011
7 p.m.

Carnegie Library of Pittsburgh-Homewood
7101 Hamilton Ave.
Pittsburgh, PA 15208

» For directions only, please call the library at 412-731-3080.

[This lecture is free and open to the public](#) on a first-come, first-served basis. There is no registration. **For more information about these events, please contact Jill**

Share This   



[Download this PDF filer](#) and send it to your friends in Pennsylvania!

21-DAY VEGAN KICKSTART

JOIN THE SEPTEMBER KICKSTART

Based on research by Neal Barnard, M.D., one of America's leading health advocates, the Kickstart is designed for anyone who wants to explore and experience the health benefits

Neal's New Books

- Signed copies offered for sale to donors.
- Personal touch – MGO offers to get book inscription personalized for donor.

Native American Nutrition Study

- Couple funded study from their family foundation.
- Nurse practitioner managing the program sent the couple a handwritten thank you note, along with small gifts from the reservation.
- Gifts were not lavish (bracelet) and became conversation piece for the wife, who loved to tell the story behind it.

Personal Touches are Working!

- Guardian Circle membership has increased 80% in the past 6 years.
- Revenue from the Guardian Circle has increased 91%.
- Average Guardian Circle gift has increased by 22%. (\$2,700 / \$3,300)

**Spectacular Stewardship
at all Levels!**

Quarterly Report from the Field

PCRM Report from the Field

PHYSICIANS COMMITTEE FOR RESPONSIBLE MEDICINE / SUMMER 2011



Dear PCRM Member,

At PCRM, taking the government to court is not something we take lightly. But when it comes to the lawsuit we filed against the USDA over its new *Dietary Guidelines*, I couldn't be more proud of our actions. I know they'll have a positive impact on human and animal lives.

Today, approximately 68 percent of Americans are overweight. Equally alarming, more than 60 percent of deaths in the U.S. today are caused by heart disease, cancer, and other diet-related diseases.

At the same time, the meat and dairy industries account for more than 10 billion animal deaths every year — more than 1 million deaths an hour.

With so many people and animals being harmed by diets rich in meat and dairy, PCRM is stepping up its work to force the government to act more responsibly by encouraging healthier eating.

Using PCRM's unique position as medical experts and scientists, we are educating when we can — and litigating when we must — to bring better health and well-being to people and animals alike.

I look forward to bringing you news of great progress and invite your continued involvement. Your support and actions are paramount to our success.

Neal D. Barnard, M.D.
President

It's Time for Honest and Meaningful Dietary Guidelines

Earlier this year, the USDA released its latest *Dietary Guidelines for Americans*. Upon first review, the new *Guidelines* are a step forward from those in years past, including important details on vegetarian and vegan diets that PCRM had been calling for. However, the *Guidelines* fall woefully short in cautioning people about the proven health risks of eating meat and dairy.

It seems the USDA would prefer to pander to agribusiness than to give consumers the honest information they need. The *Guidelines* continue to whitewash the harm that eating meat and dairy can do, resorting to terms like "cholesterol," "saturated fat," and "solid fat" that mean very little to the general public that the *Guidelines* are supposed to inform.



To protect the health of humans and save the lives of billions of animals in the process, PCRM filed suit against the USDA on February 15 of this year demanding that the *Guidelines* be rewritten to become meaningful to the public.

The USDA also recently introduced its new "MyPlate" graphic to replace its vague and confusing Food Pyramid. Similar to the *Guidelines*, "MyPlate" takes a step forward, closely resembling the PCRM Power Plate, which we unveiled last year. Unfortunately, once again, the government's version caters to agribusiness by adding a dairy group and replacing the healthy "Legumes" portion of the PCRM Power Plate with an ambiguously named "Protein" group.

People's health and billions of animals' lives are too important to take a backseat to food industry profits. We need government to stand behind nutrition policies that best serve the health of consumers, and the well-being of animals.

PCRM is making progress and building momentum toward a day when fewer animals are eaten, and more people live healthfully. This is a growing area of our work through which we hope to improve and save many lives. And, I'm so glad you are a part of it!

Go to www.PCRM.org/take action — ask the USDA to revise the *Dietary Guidelines* for the health of people and the well-being of animals!

PCRM Online

a monthly update for PCRM members and friends



Monthly Online Newsletter

- Reach thousands with program updates
- Timely
- Provides an opportunity for feedback

A Special Touch at Events: Ribbons on Name Badges



Behind the Scenes: How to Prioritize Your Time

- One of the biggest questions facing development staff today – how do you decide what is the best use of your time?

Make a List of Your Stewardship Activities

- Which things are enhancing your relationships with donors?
- How much staff time does it take?
- Are the results measurable?

Brainstorm for New Ways to Make Your Donors Feel Special!

- Can you offer:
 - Facility tours
 - Special educational sessions with an expert on your staff
 - Brown bag program updates
 - Reserved parking
 - Some behind the scenes activity that is unique to your mission and not available to the general public?

Survey Your Donors! Just Ask Them:

- Do they feel informed?
- Do they know your mission?
- Do they know your CEO or President?

The answers might drive you to develop some spectacular donor stewardship activities of your own!

Results Are In!

- Annual revenue per donor is up – from \$46.12 in 2008 to \$57.78 in 2010.
- Multi-year donor retention improved – from 53% in 2008 to 57% in 2010.
- Among multi-year donors, the number of gifts per donor each year increased dramatically – from 1.56 gifts per donor in 2008 to 2.61 in 2010!

Stewardship Toolbox

Review Your Acknowledgments

- Are they fast? 48 hours is ideal, but a week is acceptable.
- Do they reference what the donor gave to?
- Do they focus on the donor making a difference?
- Are they warm and emotional in tone?
- Copy should avoid an institutional feel – write one person to one person.

New Donor Welcome Package



www.mercy

Dear Friend of Mercy Corps,

Welcome to the Mercy Corps family! I can't thank you enough for your recent contribution which is already helping us deliver immediate aid and long-term support to people in struggling countries.

Your donation will truly make a life-changing difference for millions of men, women, and especially vulnerable children who are facing extreme adversity.

I would like to help even more! Here's my additional contribution to help Mercy Corps bring emergency relief and long-term support to the world's most impoverished communities. I have enclosed a gift of:

\$XX \$YY \$ZZ \$XYZ Other \$_____



If you have a special request, please let us know so we can communicate with you, and see the reverse side for communication options.

Check here to receive an annual report if you stay informed about the pressing work around the globe.

Email: _____

Please enclose your check, money order, or credit card gift, to Mercy Corps, in this envelope. To make a credit card gift, please see the reverse side. All contributions are tax deductible.

Jane Q Sample
Company ABC
1730 Rhode Island Ave NW
Washington, DC 20036



46 SW Ankeny Street
Portland, OR 97204

Welcome!

THE MERCY CORPS PLEDGE



MercyReport

news and notes from the front lines

FALL 2010

Rushing Food to Hungry Families in Niger

IN JULY, WE REPORTED THAT A hunger crisis was looming in Niger. Since then, the situation has worsened and millions of children and families are in need of assistance.

In fact, this is the worst hunger crisis in Niger's history. Half of the population is at severe risk of starvation, and thousands of children are already malnourished.

Last year the rains didn't fall, resulting in months of extreme drought this year. Crops are now failing, and food supplies are diminished. Traditionally, families

store enough food at harvest to last them a year, through the annual "hungry season." But now, the drought has destroyed harvests and livestock are dying. Mothers, fathers and children literally have nothing to eat.

Mercy Corps will stay in Niger helping children and parents for the long term.

We're rushing emergency food rations to suffering children and families. We're delivering more than 6,000 tons of corn, beans and cooking oil to more than 20,000 families in the Filingie region.

But we're not only delivering supplies. Mercy Corps has also created a cash-for-work program that pays a fair daily wage to thousands of men and women so they can buy food to feed their families.

Through meaningful jobs, we're empowering Nigerian families to become self-sufficient.

While we rush aid to Niger, others around the world still need our support. Read about our response to the floods in Pakistan inside.



NIGER



Children in Niger are most at risk of starvation.

Even with these emergency programs in place, families in Niger will have a long road ahead. But, with the help of compassionate supporters like you, Mercy Corps will stay in Niger helping children and parents for the long term.

We'll support farmers so that they can rebuild years of uncertain harvests and learn better methods to feed drought-prone villages.

And we'll work with mothers so they understand how to prevent childhood malnutrition.

It pains all of us to see families go hungry – and that's why we are rushing to the side of thousands in Niger during the worst food crisis in years.

mercycorps.org

Cultivate Your Donors by Mail

- Version appeals for special donor segments.
- Tailor a regular appeal to exclude the ask to create a nice cultivation touchpoint.
- Use internal documents to create “insider” mailings to bring donors closer.
- Create a simple newsletter to keep donors abreast of your work.
- Use acknowledgments to promote other ways to give.
- Annual cultivation postcard to all donor levels is a nice touch!

Develop a Communications Calendar

- Include all touchpoints throughout the year:
 - Mailed newsletters and appeals
 - E-newsletters and appeals
 - Event invitations
 - Telemarketing
- Use consistent messaging across channels

Cultivation Package featuring program information

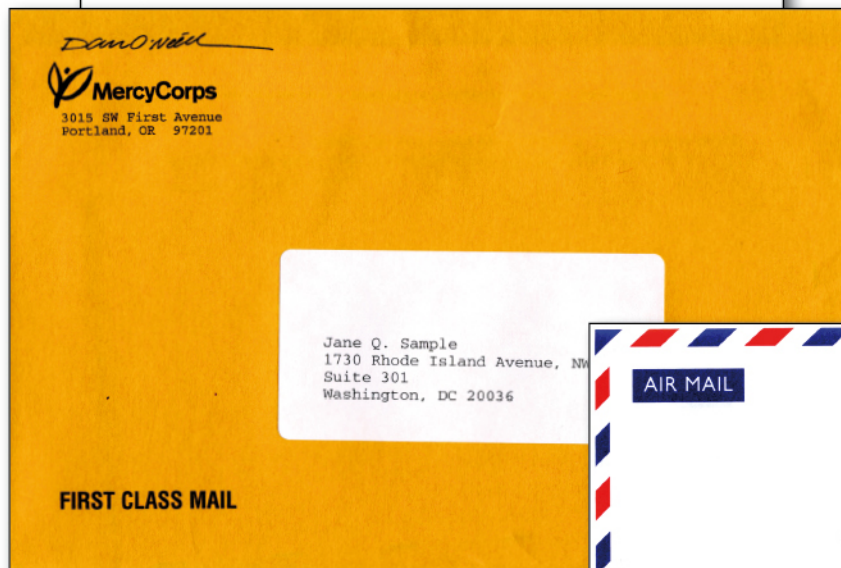
from the desk of
DAN O'NEILL

February 9, 2009

Dear Jane,

You have probably been hearing a lot these days about the "global credit crunch." And frankly, it is hard for most of us to fathom loans in the hundreds of millions – and billions – of dollars.

Yet at the opposite end of the spectrum, Mercy Corps is making it easy to understand how very small loans, for \$250 or even just \$25, can mean a world of difference ... thanks to your extraordinary generosity!



With nine children to care for, Ricardo Guaña and his wife, Manuelo, of rural Ecuador had always struggled to make ends meet. But when Ricardo's carpentry work began to dry up, the family's situation went from strained to desperate. At that point, they fell back on Manuelo's modest beekeeping business. But with few resources and inadequate equipment, their tiny business couldn't earn enough money to feed their family.

Thankfully, their son Marcelo learned of ACCION's long-time partner CREDIFE and the microfinance tools they provide families like his. With a microloan made possible by generous supporters like you, the Guañas were able to invest in more hives and better equipment. Today, they produce enough honey, royal jelly and honeycomb to support their family and work towards a better future!

Thank you for helping millions of hardworking families like the Guañas around the world. Learn more about the Guañas and download their family honey-peanut candy recipe, dulces de miel, by visiting www.accion.org/honey today.

Photo credit: John Rae for ACCION International

www.accion.org



Mr. Josep
130 Bow
Boston, N

Thank you for helping millions help themselves.



Cultivation
Postcard to
thank donors at
all levels



for helping us preserve
Marine Corps history and heritage



Memo

Date: March 2010

To: Marine Corps Heritage Foundation Campaign Members

From: Lieutenant General Ron Christmas, USMC (Ret)
President and Chief Executive Officer
Marine Corps Heritage Foundation

Re: Quarterly Update

Dear Campaign Member:

I am proud to share with you that the Marine Corps Heritage Foundation finished 2009 on sure footing despite a difficult economy. It is thanks to the stalwart support of committed, patriotic Americans like you that we have started 2010 well positioned to continue our mission past, present and future.

Because you are a loyal Campaign member, here are our goals for the year ahead:

- In 2009, we made great progress on our National Museum. These new exhibits – from its founding in 1776 to the present – will be open to the public in June 2010! The WWII exhibit chronicles the seminal expansion of the Marine Corps to become the elite fighting force that you are able to participate in an exciting way. The exhibit features Marines charging across the white sands of Iwo Jima.
- On February 19, we marked the 75th anniversary of the landing on Iwo Jima by hosting Iwo Jima veterans and their families at the Marine Corps. In attendance were several members of Marine Corps leadership. I wish to extend my



NATIONAL MUSEUM OF THE MARINE CORPS



*Marine Corps Heritage Foundation
President and CEO Update Enclosed*

Mr. Nicholas Linkowitz
5848 Banning Place
Burke, VA 22015-3604



Mailing with
“insider info”
for High-value
Donors

(over, please)

Donor Cultivation Newsletter



Colorado Rockies Area Team serves food at a local shelter

AFS National Day of Service

On April 16th, AFS students, returnees, volunteers, families, and friends throughout the United States joined forces in support of our first AFS National Day of Service. Held in conjunction with the Global Youth Service weekend, AFS participants volunteered on many different kinds of community-based service projects, from cleaning local parks and serving meals at shelters, to spending time with nursing home patients.

Interested in:

Hosting an AFS exchange student? **Sending** an AFS exchange student abroad? **Volunteering** in the AFS community? Or **Making a Contribution**?

Learn more at: www.afsusa.org

Follow us:



Facebook



Twitter



YouTube

von Briesen Challenge Reaches 100K Goal

The AFS-USA-von Briesen Family Challenge successfully reached its goal of raising \$50,000, making it possible for the organization to offer \$100,000 in additional scholarship support to students who study abroad through the AFS Faces of America (FoA) Diversity Scholarship Program.

Through FoA, AFS-USA partners with community-based organizations to identify their "best and brightest" high school students who are participating in leadership, education, mentoring programs and award them with scholarships to study abroad—an experience they would otherwise not be able to afford.

In 1960, Theodore (Ted) von Briesen studied abroad in Germany for a semester. His experience had such an impact on him that 50 years later, he celebrated his AFS anniversary by establishing a \$50,000 challenge grant for deserving students to benefit from the same experience.

More than 250 generous individuals took part in the challenge. Ted did not stop there, however. He is now reaching out to the AFS Exchange Class of 1961 to help them establish the challenge grant for AFS Faces of America.



Ted von Briesen pictured with former Faces of America participants

AFSers in the News

Recently, Pakistani student Falak Sher Marri shared impressions from his year-long stay in the United States on the web site ThreeSixtyJournalism.org.

This was the first time I observed how much Americans care about the world. It gave me a very positive impression of Americans. There are great cultural differences between Pakistan and America, but I've seen a lot of similarities. Our moral values are the same, like respecting elders, caring for neighbors, helping those in poverty, working toward equal opportunities for all, and rehabilitating the needy.

I just wish we could exclude the word "different" when we talk about each other. I believe that all nations have the potential to unite under one tree with branching common causes: peace, love, human welfare, and education. And based on my experience, studying abroad would be a great way to achieve this. Cultural exchange helps us see how we're not so different from each other.

Falak, a Kennedy-Lugar YES exchange student from Pakistan, was hosted in Minnesota for the 2010-11 school year.



Connecting Lives. Sharing Cultures.

AFS-USA Global Connections

A Special Publication for Key Supporters in the AFS Family

Issue 1, Spring/Summer 2011

From the President's Desk

Welcome to the inaugural issue of *Global Connections*, a publication to help keep you better informed about what is happening with AFS-USA. Without your commitment to the AFS-USA programs and mission, we could not effect the change in our world that is so critically important to all of us.

I am pleased to report on some key 2011 initiatives:

Fiscal Stability With an operating surplus of more than \$1 million for 2010, we're financially sound and investing in new programs.

New Programs We're continually implementing innovative new programs offering shorter stays, educator-led programs, and opportunities for middle school students in addition to our traditional programs.

Distinctive Philanthropy We're making the case for support of vital programs, such as AFS Faces of America, our signature diversity scholarship program, to more individual and institutional funders.

Outreach to Educators We're expanding the number of schools we work with and partnering with educators to bring more intercultural learning to all students, not just those who study abroad.

Thank you for all you do for AFS-USA. I look forward to keeping you connected as a key member of our AFS-USA Family.

Jorge Castro, President and Partner Director
Argentina to U.S., 1978

Assistant Secretary of State for Educational and Cultural Affairs says AFS Volunteers are "vital"

"You are the public face of America," said Ann Stock to NVA attendees



(From left to right) Mary Porterfield, AFS-USA 2011-12 Board Chair, Jorge Castro, Ann Stock

Recently, AFS-USA held its third National Volunteer Assembly and welcomed AFS Volunteer delegates from across the U.S. This year's keynote speaker was Ann Stock, Assistant Secretary of State for Educational and Cultural Affairs. While addressing the Assembly, Ms. Stock highlighted the importance of volunteers in the work of public diplomacy: "*To thousands of international exchange participants, you are the public face of America. You play a vital role in strengthening U.S. standing in the world.*"

While in St. Louis, Ms. Stock also met with AFS Exchange Students currently hosted in the area, their host families, educators, and AFS Volunteers.

The exchange students who met with the Assistant Secretary are participating through the ECA-sponsored Kennedy Lugar Youth Exchange and Study Program (YES), the Congress-Bundestag Youth Exchange (CBYX), and Future Leaders Exchange (FLEX) programs, which Ms. Stock calls "*the most important public diplomacy initiatives we can conduct. Interest in these programs is increasing overseas and your efforts here at home have made these programs a model in the exchange community.*"

Show donors
that you know
who they are!

 **Marine Corps Heritage Foundation Contribution Form** 

YES, I support the campaign to tell our Corps' entire story — our glorious, unfolding history — at the National Museum of the Marine Corps. Enclosed is my contribution of:

\$50 \$80 \$100 Other \$ _____

 Mr. David J. Maines
26 Harlem Street
Lowell, MA 01854-1716
|||

Supporter Since: 2008 

Please return the top portion of this form with your check made payable to MCHF. To charge your donation, please see reverse side of this form. Use a ball point pen and do not detach backing.

Thank you for your support!

105471 CB 06 2490
3800 Fattler Park Drive, Suite 104, Dumfries, VA 22025 | www.marineheritage.org | 1-800-397-7585

 Jane Q. Sample 1730 Rhode Island Ave, NW Suite 301 Washington, DC 20036	 Jane Q. Sample 1730 Rhode Island Ave, NW Suite 301 Washington, DC 20036	 Jane Q. Sample 1730 Rhode Island Ave, NW Suite 301 Washington, DC 20036
		
		
		
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Personalized Certificates of Appreciation enhance relationships




Certificate of Appreciation

Mercy Corps gratefully recognizes

Chris Q. Sample

for saving lives around the world.
Thank you for your outstanding commitment in 2010.


Dan O'Neill
Founder



2010 Matching Gift Challenge

Please Respond by: December 1, 2010

From: Jane Q. Sample
1730 Rhode Island Ave NW
Suite 301
Washington, DC 20036

To: Dan O'Neill
Mercy Corps
45 SW Akenev St
Portland OR 97204

SOURCECODE ID123456789



...age of the special matching gift offer and have my gift to Mercy Corps
...ve enclosed my contribution to reduce suffering and rebuild the lives of

2MRC
e 2*2MRC

1.5 MRC doubles to become 2*1.5MRC
 Other \$ _____ doubles to help even more!

...le to Mercy Corps, in the enclosed envelope. To make a credit card gift, please see reverse.
...he full extent allowed by law. Thank you for making a special heartfelt gift today.
...e contribution.

Akenev Street • Portland, OR 97204 • 888.842.0842 • www.mercycorps.org

Matching Gift Offer Enclosed.

Please Respond by: December 1, 2010

Time Sensitive Materials.

charity: water


Map Satellite Hybrid

↑
← →
↓
+
-

Umm Schanah

Google

Map data ©2010 Google, LeadDog Consulting, TracksAfrica, AND - Terms of Use

 **charity: water**

charitywater.org
info@charitywater.org

Sto, Ethiopia
350 consumers
GPS: 14.08436111, 38.54647222

Before this new hand dug well was installed, the villagers were walking 45 minutes to a dirty, low yield river. The residents of Sto are ecstatic to have clean water for the first time.

Partner: A Glimmer of Hope & REST
Sponsored by: Pete Cashmore @ Mashable / H2O Africa Foundation
Hand-dug well, completed: Summer 2009
[Donate a well at charitywater.org](http://charitywater.org)

Copy Tips to Strengthen the Relationship Between Donor and Your Organization

- Focus on the donor – not the organization.
- Use “you” as often as possible.
- Make it clear the donor’s support is making a real difference.
- Remind donors how long they have been giving.
- Letter should be warm and emotional – not institutional.
- Use specific, illustrative examples.

A Simple Phone Call Saying “Thank You for Your Support!” Can Go a Long Way

- Call donors who give \$250+ gifts.
- Call donors who gave last year but not this year – just to say thanks.
- Recruit staff and board members to participate. Depending on mission, beneficiaries could help make meaningful thank you calls.

Create a System to Track Donor Communication Preferences

- Allow donors to request less mail.
- Ask donors if they want to opt out of list exchange.
- Let donors know you heard them. “This is the one appeal you requested!”

Resource Library

- *Building Donor Loyalty*, by Adrian Sargent
- *Zen of Fundraising*, by Ken Burnett
- Web article with acknowledgment tips – www.sofii.org/node/258

Thank you!

Lisa Maska, CFRE

lmaska@lautmandc.com

Betsy Wason, CFRE

bwason@pcrm.org



Lisa Maska, CFRE
lmaska@lautmandc.com

Betsy Wason, CFRE
bwason@pcrm.org

Don't forget to visit the Solutions Showcase!

*Many of the ideas discussed today are
on display at the Solutions Showcase!*

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