

Your Donor Love and Loyalty Plan

Cultivation, Engagement and
Relationship-Building Worksheet

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Intro

Stewardship is commonly used to describe the process of building donor relationships over time. This is actually a misnomer, as the definition of stewardship is “The careful and responsible management of *something* entrusted to one’s care.” Really, stewardship is something you do **to** the donor’s **gift**. It’s about preserving the donor’s intent regarding the use of their philanthropy.

What you do **with** the actual **donor** is something else ... which is why you’re seeing a shift to terms like donor relations, donor service, donor engagement, donor love and, perhaps my favorite, donor experience (borrowing from the hot “customer experience” movement).

I like the latter definition, because it’s broad enough to shine a light on the BIG PICTURE: **Your donor’s entire journey with you – before, during and after making a gift.** A former boss used to refer to me as the “director of donor experiences.” No, it wasn’t my official title, which was the much more opaque “director of advancement.” I was fortunate to have a boss who really understood what effective development is all about – *developing* lasting bonds of friendship. Bonds that, ultimately, transform to love and loyalty.

So, what shall we call this process of relationship building? Of wooing? Of bonding?

For the purposes of this Worksheet, let’s agree to call it a “Donor Love and Loyalty Plan.”

This puts the focus squarely on your donor, making it about **them** and **their experience** rather than about **you** or their **money**.

It’s everything but the ask. All the relationship-building communications and activities that take place **before** and **after** the gift has been made. Essentially, it’s all the things you do to establish and build donor trust over time, including:

Saying “thank you”

Repeating gratitude

Being accountable and transparent

Impact reporting

Engagement through regular two-way communication

Appreciation events

Recognition

**You can also think about this as your
“Happiness Delivery Plan.”**

Do you notice I keep emphasizing the word “plan?” You don’t want to leave this to happenstance. Cultivation, relationship-building and stewardship – or whatever you choose to call these activities – are not strategies to push to the back burner or trot out quixotically whenever a board member happens to suggest something. They are bottom-line business strategies! As such, each strategy should relate to a business goal. And the lucky thing is this: Making your donors happy tends to support your key fundraising goals!

Deliver happiness, and your donors will:

Renew their support.

Upgrade their support.

Refer new donors to support your cause.

These, in fact, are the metrics to measure to determine whether *your* Donor Love and Loyalty Plan is working. They’re the metrics that make this Happiness Delivery Plan one of your most powerful fundraising tools.

*“Philanthropy is the gentle art of
teaching the joy of giving.”*

Hank Rosso, Founder, The Fundraising School

Fundraisers, when all is said and done, are in the “Happiness Delivery Business.”

Think about this for a moment. Why do you do what you do? You're not a 'money grubber.' Sure, you need to ask for money to ensure your mission will thrive. But money is only a symbol of what your donor seeks when they make a philanthropic gift. They are generally seeking one or more outcomes.

Usually it's to create positive change. To right a wrong. To end suffering. To perpetuate a cherished value. To give back. To pay it forward. Underlying the desire to create change are other motivations. Like feeling good about the person they'd like to be when looking in the mirror.

The reason you ask for money is to make the world a better and happier place. Right? And this extends to donors too!

You must go about your Happiness Delivery Plan with intention. Because [giving is seldom its own reward.](#) Your donor needs your help if they're to truly bask in the glow of their giving.

There's plenty of research [showing that giving leaves people with a warm glow](#) – an actual shot of dopamine triggered by the brain's pleasure center. So a good way to approach building your Donor Love and Loyalty Plan is to think about what would make your supporters happy.

Of course, you begin with a prompt and personal thank you. And you'll find plenty of examples of how to say thank you the first time, and then repeatedly throughout the year, in our eGuide: [How to Build a Donor-Centered Acknowledgment Program.](#)

Here we're going to go beyond a simple thank you letter, email or call and move forward on a journey – your donor's journey, with you as their '[Philanthropy Facilitator.](#)'

Are you ready to give your donors the love they deserve? You'll find a worksheet here you can use as a template to build your own Donor Love and Loyalty Plan.

Steps to Building a Donor Love and Loyalty Plan

1. Make a list of 2 types of activity*

Begin by making a list of two different types of interaction and connection. Think of these as a “gift list” – what you’ll offer your donors to win them over:

1. Engagement Activities
2. Content Distribution

It may be useful to start with a schedule of types of activities and communications that currently exist at your organization.

It’s easiest to begin by piggybacking on what you’ve already got; then see where there may be gaps in what you have to offer to draw your supporters closer to you. For example, if you offer a lot of direct service volunteer activities you may find inviting your major donors to participate is an excellent cultivation tool. If you have a lot of committees and/or advisory groups, this may be a good place to plug your donors into. If you send a monthly e-newsletter, you may want to add a regular feature you know donors will enjoy (e.g., Story of the Month; Recipe Corner; Reading Recommendation). If you don’t have such activities or opportunities, you may want to create some.

Make a list of any annual events, fundraising campaigns or marketing communications already scheduled. What can you piggyback onto by just adding a personal twist (e.g., a major donor reception preceding your annual gala; a meet and greet with the cast following a play performance; a VIP space at your annual walkathon, etc.)?

Once you’ve created a list of the major engagement activities on your schedule, you can add your donor love content and spread it strategically over multiple communication channels throughout the course of the year.

Account for the timing of these occurrences so your donor love plan doesn’t trip on your fundraising plan. Think of this as wooing, wooing, wooing ... then “popping the question” once your donor has been warmed up.

“Remember, even after you’re married you don’t just say “I love you” on your wedding day. This is your plan to keep the love coming!”

* For more guidance on building this “gift list” for your donors, see “Best Practices” below.

ENGAGEMENT:

- Off-site group get-together such as a house party, luncheon, or reception with organizational leadership (e.g., executive director, board president, other volunteer or other staff VIP)
- On-site group tour
- On-site individual tour
- On-site group get-together such as 'office hours' or 'brown bag' with organizational leadership (quarterly opportunity)
- On-site lecture, performance or event:

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- Personal phone call by meaningful staff or volunteer
- Personal advice visit from development staff
- Meal with executive, associate executive or program director (or faculty, scientist or health care professional)
- On-site meeting with recipients of donor support (e.g., clients, students, faculty, teachers, researchers, musicians, artists, etc.)
- Personal advice and impact report visit from VIP staff or volunteer
- Honor at event
- Involve as ambassador (host, tour guide, volunteer activities)
- Involve as advocate (speaker, P2P fundraising; workplace campaigns)

ADD'L DESIRED ENGAGEMENT ACTIVITIES:

CONTENT:

- Relevant newsletter or blog stories with personal note from development director
- Special insider updates sent from program or department to which gift was designated (e.g., research, milestones, hiring, awards, success stories, etc.)
- Story of the (month; quarter) sent from executive director (e.g., "Stories that will break your heart and restore your hope")
- Annual insider update sent from executive director
- 2- to 4-page major donor Personal Impact Report from VIP
- Note from beneficiary
- Profile in newsletter, blog, other communications
- Recognition in donor honor roll
- Recognition on donor wall or plaque
- Recognition on social media
- Holiday greeting card
- Birthday card
- Anniversary card (personal or milestone with organization)
- Personal invitation to annual event
- Token donor gift:

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ADD'L DESIRED CONTENT TYPES:

2. Set up Donor Love Activity guidelines

Once you've got a [great list of wooing opportunities](#), set up guidelines for engagement at different levels of giving (by dollar amount) and/or for different categories of givers (e.g., by affiliation: you might offer slightly different engagement and/or content for board members, direct service volunteers, former students, etc., than for those not similarly affiliated). The key is recognizing you know your supporters and appreciate the many ways they are connected and invested with you.

Suggested Donor Love Activity Levels*

Platinum Society (\$100,000+)

- Two or more visits by development officer, or other meaningful member of staff or leadership
- Three or more phone calls by development officer, or other meaningful leader.
- Personalized Recognition Gift (up to \$100)
- Special Individual Recognition Dinner with VIP staff or volunteer leader(s)
- Permanent Recognition
- X tickets to X events
- Plus Gold Society benefits

Silver Society (\$10,000 - \$49,999)

- One phone call or visit from development officer, or other meaningful member of staff or leadership
- Personal tour (at donor's discretion)
- Annual Endowment Report
- Annual Impact Report
- Program Mailings
- Recognition Gift (up to \$10)
- X tickets to one event
- Birthday Card
- Plus Bronze level activities

Gold Society (\$50,000 - \$99,999)

- One or more visits by development officer, or other meaningful member of staff or leadership
- Two or more phone calls by development officer, or other meaningful member of staff or leader
- Recognition Gift (up to \$50)
- Special Recognition Luncheon with VIP staff or volunteer leader(s)
- X tickets to X events
- Special privilege (e.g., parking card; champagne reception before events; café discount; priority admission)
- Plus Silver level activities

Bronze Society (\$5,000 - \$9,999)

- One phone call from development officer, or other meaningful member of staff or leadership
- Group behind-the-scenes tour
- Token Gift (up to \$5)
- X tickets to one event
- Holiday Card

* Numbers and names are sample examples only, and will vary for every organization. Your 'Guidelines' is not a published document. These are examples for building relationships with major donors at various donation levels. You can find a cultivation and appreciation template suitable for all levels of donors in our eBook: [How to Build a Donor-Centered Acknowledgment Program](#).

3. Develop personalized donor love plans

Next, determine what types of engagement and content are appropriate for donors you seek to retain and upgrade. *Every donor deserves to be loved!* Lower level donors need hugs and kisses. Higher level donors should also get some more substantial ‘gifts.’

Since, typically, some version of the Pareto Rule applies - i.e., you receive 80% to 95% of your contributions from 5% to 20% of your donors, you’ll particularly want to focus on individual major gift donors. Ultimately, you’ll want to develop personalized plans tailored to what you know these VIP donors will likely appreciate. Overall, the ‘moves’ and ‘touches’ you select will be similar. However, there will be slight differences, depending upon your donor’s passions and readiness to be asked for another gift.

The point of donor love is ultimately to persuade your donor to return your love!

Here are some highly individualized things, large and small, I’ve done or have seen done:

- Offered the opportunity for an amateur composer to have his composition played by the youth orchestra.
- Offered the opportunity for a donor to be married in the sculpture garden.
- Brought back a souvenir from my summer vacation I knew the donor would enjoy.
- Sent musicians to the donor’s house for their anniversary party.
- Gave a muscle car calendar to a donor who loved them (It was a freebie I received in the mail; he loved it!).
- Delivered home-baked cookies to donors who established irrevocable legacy gifts.
- Invited a donor’s children and grandchildren to a special brunch in the activity room she was endowing.
- Baked cookies for a widower using the recipe his wife loved (the one she used to bake and bring to board meetings); also served them at a public event to which he was invited.

Make Your Own List

Highly Individualized Donor Love Opportunities for Your Organization (if applicable):

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

4. Develop a tracking system

You need a system for keeping track of the donor love ‘moves’ and ‘touches’ you are making. You’ll also want to record who is scheduled to make each connection, and when this contact occurred. For major donors, generally a major gift officer or the director of development will keep track of this plan for each individual donor in your “Donor Love Portfolio.”

Your database may enable you to generate reports and/or track these things on a constituent’s profile. If not, you can create a spreadsheet or word document. I can remember far back enough (before computers!) when I tracked these activities in a big three-ring binder. Every donor had their own page(s). Whenever I called them (or they called me), I could easily refer back to their personal cultivation plan to see which stage they were at in their journey with us.

Remember to keep track of *all* the interactions your donor is having with you. Do this by making sure any staff member involved in engagement and/or content delivery activities either enters this information directly into your donor database or reports back to you so you can do so. You may want to set up regular debriefing meetings to assure you receive input in a timely manner.



Examples

Here's an example of some of the types of activities you might want to include for each major donor prospect. Of course, what *you* choose will differ based on what makes sense for your organization.

Recognition:	Suggested timeline/notes:
Recognition Gifts: <input type="checkbox"/> Parking Card <input type="checkbox"/> Pin <input type="checkbox"/> Commemorative Photo Album <input type="checkbox"/> Formal Keepsake/Memento/Certificate <input type="checkbox"/> Other	
<input type="checkbox"/> Media	
<input type="checkbox"/> Article in publication	
<input type="checkbox"/> Special Event (Open House; Reception; Groundbreaking)	
<input type="checkbox"/> Permanent Recognition (Naming, plaques)	

Engagement:

Suggested timeline/notes:

Number of Visits:

- ☐ VIP staff
- ☐ VIP board
- ☐ Program director
- ☐ Recipient/Beneficiary
- ☐ Director of development
- ☐ Tour

Number of Phone Calls:

- ☐ VIP staff
- ☐ VIP board
- ☐ Program director
- ☐ Recipient/Beneficiary
- ☐ Director of development

Event Invitations:

- ☐ Opening Reception/Groundbreaking
- ☐ Recognition Dinner or Luncheon
- ☐ Program Events
- ☐ Volunteer Events
- ☐ Award
- ☐ Donor Appreciation Event
- ☐ Open House or Information Event
- ☐ Advocacy Day

Engagement:

Suggested timeline/notes:

Other Communications:

- ☐ Web Site
- ☐ Honor Roll
- ☐ Donor Newsletter
- ☐ Annual Endowment Report
- ☐ Impact Report
- ☐ Birthday Card
- ☐ Anniversary Card
- ☐ Holiday Card
- ☐ Memorial Card
- ☐ Social Media SHOUT OUT



Donor Love and Loyalty Best Practices

1. Report, report, report on impact

Penelope Burk's groundbreaking research in [Donor-Centered Fundraising](#) discovered donors care primarily about just three things. They all have to do with [demonstrating gratitude](#) and [reporting back](#).

Donors want:

1. **[Prompt](#) thank you.**
2. **[Personal](#) thank you.**
3. **[Powerful](#) demonstration of gift's impact.**

After the initial thank you, donors would really, truly like to hear from you at least one additional time about the impact of their giving before you ask them for another gift. This holds true for all donors, large and small.

Donors need to know their gift made a meaningful impact.

They need to feel they can trust you to follow through and put their gift to its intended use. And they need to feel their association with you is rewarding. They need you to give back to them something they value (usually an intangible "feel good") in exchange for the value (money) they gave to you. [The foundation of all philanthropy is completing this value-for-value exchange.](#)

Reporting on the donor's impact is vital to fulfilling your donor's expectations.

Your report should be specific, yet emotionally driven. You could, for example, send an update featuring a recipient of your aid. Include a picture of this person being helped, and explain how the donor's gift directly resulted in positive change for this person.

The type of reports you provide should be governed by the level and purpose of the gift.

For example, it would be appropriate to call a major donor to update them personally on how their donation built a new home for a family in need. You could even take them to the worksite. Then you could send several smaller reports throughout the course of the year, perhaps even including a thank you from the family they helped. The more your donor gives, the more effort you put into reporting back and keeping them feeling the warm glow from their gift.

Your new and smaller-gift donors deserve to see the impact of their gifts just as much.

However, in these cases, you can send a letter or email and post a mass update on your blog or social media. You still want to do this multiple times throughout the year to keep the love flowing. Understanding how your donors prefer to be communicated with can help you reach them most effectively. It's a great question to ask soon after their donation.

2. Tell stories

Human beings are wired for storytelling. We loved hearing stories when we were kids, and our kids love hearing them from us. There's something about a story that lowers our defenses and makes us want to enter the narrative. For your donor, make sure you show them how their gift has improved the life of a specific person, animal, place, thing or community. And help them see themselves as the hero!

Stay away from lots of data.

There's something about data that makes us want to put up our dukes and refute the statistics. Your goal is to give your donor a warm, fuzzy feeling — not to make them wonder if the numbers are right.

3. Let others tell your story

Allow the recipients of your nonprofit's aid to speak for themselves. Their words are better at expressing how much the donor's philanthropy means. And feel free to get creative. If you don't have people as beneficiaries, send a letter from a dog, a painting or a tree!

4. Segment your strategies

Your donor love strategy will vary depending on the way your donors break into groups. These groupings are a starting place:

Major Donors: Major donors already love you, but you'll still need to build your relationship with them to keep their ardor burning. Absence does not make major donor's hearts grow fonder! To maintain and increase their current giving, you'll want to develop individualized donor love plans. Most cultivation efforts are concentrated on these donors. However, it's important you recognize the value of high-level relationship building with other promising donor groups.

Transitional Donors: Usually loyal mid-level donors with greater giving potential. They are transitional because they are slowly increasing their cumulative giving, or they've given consistently. They may be monthly donors who've already upgraded by virtual of transitioning to a monthly giving plan. Some may be ripe for a further upgrade. You can try to speed up the process by paying these donors special attention.

P2P Fundraisers: These are folks who, while they may be \$100 donors themselves, have been generating similar gifts from friends and colleagues through personal crowd fundraising campaigns. A \$100 donor who generates \$100 gifts from 20 friends is like a \$2,000 donor. They should be loved accordingly if you want them to continue to be an active ambassador on your behalf.

New Donors: Every donor is valuable, and deserves a hug. Think of your thank you letter, email and thank you landing page as a virtual hug. Giving new donors hugs is vital for retaining them. Be as specific and personal as possible, mentioning the amount and purpose of the gift and describing how the gift will make an impact. And open the door for other types of involvement. Even a \$25 online gift can warrant an emailed welcome package that includes opportunities for further engagement, upcoming events or volunteer activities.

5. Establish Giving Societies

Creating exclusive memberships at different levels of giving can create a strong sense of community – something many donors seek. It can also incentivize donors to give more so they can rub shoulders with other like-minded donors who care about your nonprofit's work. And sometimes folks will want to join because they like the benefits you offer. Concentrate on offering benefits that build a strong community of philanthropy (e.g., appreciation events; receptions; open houses; tours).

6. Donor Love Tools and Infrastructure

It helps to have a donor database and/or constituent relationship management (CRM) software that enables you to record data, track relations with donors, segment donors into key groupings, produce individual donor profiles and activity reports, and create/assign tasks/to-do's that seamlessly integrate your cultivation plan with your database. Larger and mid-size organizations will want to invest in such a donor database management system. Smaller or newer nonprofits may want to seek out calendar software to keep track of their stewardship efforts. Calendar software can be used to schedule specific stewardship meetings, events and interactions. This can keep you on target as you manage major donor prospect interactions.

7. Donor Love Channels

It would be sad if your donor never saw your acknowledgments, reports and invitations because you sent them via a channel they seldom use. So ... send communications through the channels you used to ask, and through which your donors chose to give. Select a mix of channels to hedge your bets. Snail mail. Email. Newsletters. E-newsletters. Blogs. Social media. Website. Events.

Summary

Want to survive and thrive in today's competitive nonprofit marketplace? Make donor retention a priority! If you don't love your donors, someone else will.

Keep your donors close by providing them with a great, transformative donor experience. Think from their perspective, not yours. What do they need and want from you? What do they hope to gain from their affiliation with you? What drew them to you and continues to inspire them?

Take every opportunity to ask donors what motivates them. Take every opportunity to listen, and notice what their behavior tells you about what they value.

Deliver on donor values.

The best way to assure you deliver is to build a plan, and then follow that plan: Your Donor Love and Loyalty Plan. It begins with [saying thank you...](#) continues with [demonstrating impact...](#) and grows to a crescendo with various acts of [helping, not selling](#).

Did you know that half of donors give 2/3rds of their annual giving to a single charity? That's why you want to become the "favorite." Wouldn't it be terrific if your donors adopted you and thought of you as a member of their family?

Truly, that's how important you want to become to your supporters. But it won't happen just because you're a "good cause." There are oodles of great causes out there. Oodles. It will happen only when you show your donors you (1) know them and (2) love them.

About the author

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Claire Axelrad, J.D., CFRE is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning online [Clairification School](#) and blog showcases her practical approach, which earned her the AFP "Outstanding Fundraising Professional of the Year" award. Claire, who teaches

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