

## **Donor Development/Appreciation Process**

### **By Cary Wilcox of Sierra Pregnancy & Health**

Collaboration is essential. Weekly meetings with Executive Director, Marketing, and Donor Development team members provide different ideas/perspectives to further donor engagement and time to review what works and what doesn't. We need to have a consistent 'touch' with our family of givers with various ways to stay connected. Remember our donors love babies, belly bumps, and bible verses!

#### **First-Time Donor Process**

- One-time gift of \$250 or less – schedule phone call out 5 days after gift is made.
  - Ask how they heard about us, include recent patient story, and consider scheduling a tour
- Onetime gift \$500+ or monthly pledge – same process as above but contact within next business day
- After phone call or donor didn't provide contact information at all– Mail handwritten thank you with some clinic brochures, stickers, and business card
- 45 days after initial gift and no additional gift made yet
  - Mail another card w/ clinic story + some item to remind them of the center/mission
- Let them know about our Prayer Texting opportunity to learn/pray in real time for our patients/clients.

#### **Donor Gratitude System**

- One-Time Gifts
  - Always receive handwritten thank you card
  - If \$1,000+ or are newly engaged – phone call thanking them for gift with handwritten card
- Monthly Donors
  - Quarterly Receipts, by mail, with a letter + YTD giving + Personal note hand-written by ED/CEO
  - Summer appreciation: Thank you cards from staff/volunteers to express different ways their gifts have made an impact on clinic/community
- Anniversary Gifts
  - Segment donors by their initial gift.
    - Those who've given within the last 12 months receive a handwritten thank you card about how their gift made an impact + include clinic branded gift (notepad, bookmark, sticker, pen)

- Those who are on the verge of lapsing or gave in the previous 12 months receive handwritten thank you card that specifies considering a tour of the clinic + some item to remind them of the mission
  - Each year, a different gift is given
- Year-End Gift
  - Donors who gave \$500+ in calendar year receive a special gift (calendar w/ clinic babies, staff favorite verses, etc)

### **Re-Engage Lapsed Donors**

- Open House event – tour the clinic + provide coffee, pastries, + staff interaction
- Host smaller events at the clinic
- Personal thank you note from ED/CEO
- Coffee invitation from ED/CEO

## **Engaging Donors who use Donor Advised Funds (DAFs)/Trusts**

### **Engage Advised Fund Donors**

- **Appreciation**
  - Remember to do a 'soft credit' to the giver advising funds toward the center Following above rules
  - Find ways to educate them on your community impact
  - Personalized communication and highlights of your impact through
    - Personalized emails for them (through your email system)
    - Thank you notes from ED/CEO
- **Educating donors on DAFs**
  - Create materials to send to your donor base
    - What a DAF is
    - Encourage them to consider using them for charitable giving
      - We have donors that give anywhere from \$50.00 a month through their DAF to \$50,000
    - Share compelling stories that demonstrate how DAF donations can make a difference
  - Ensure your giving platforms (beyond center) have updated profiles
    - Many donors want to see the integrity of your center
      - Charity Navigator, others

**TRUSTS** – Help your donors understand long-term impact in the community with their help and offer ways to give through DAFs or putting the center into their trusts.