



# East Bay Gives 2017 Donor And Board Engagement Boot Camp





# Agenda

- Basics
- Donor Engagement
- Board Engagement
- Q&A





# Basics

- Goal setting for East Bay Gives for your organization
- What is cultivation?
- What is stewardship?



# Donor Stewardship



- Who are your current donors and what do you know about them?
- How do you currently steward donors?
- Try new ways of engaging current donors such as connecting over social media, inviting them to your events, interviewing them for stories, etc.



# Donor Cultivation



Once you have defined your target audiences, think about the most effective strategies to reach them, such as:

- traditional letter writing campaign
- email blasts
- social media





# Donor Cultivation

- Ask staff and board members to utilize their networks to recruit new donors
- Use existing donors to mobilize new donors through social media, donor stories, and EBG campaigns.
- Make sure your EBG profile page is enticing for new donors.



# Donor Retention



- The key to donor retention is saying thank you.
  - This conveys gratitude, continues a positive experience with the giving day, and builds the long-term relationship.
- Report back to donors on goals you reached, how funds were used, and important learning.





# Donor Retention

- Invite new donors to other events with your organization.
- Donor retention goes from 22% to 60% once a second gift is received!







# Activity

Telling Your Story:

Audience Challenge #1

In 25 words or less, state your organization's mission and include how the world is different because your organization exists.





# Activity

## Audience Challenge #2

What makes your organization unique?

How can you best convey stories/examples of the impact your organization is having on the world?





# Donor Engagement: Best Practices

## #1 Know your donors

- Who are your current donors in terms of demographics, history with your organization, preferences, etc.
- Recruit existing donors to be ambassadors for your cause.
- Think about new audiences you want to target. How will you find them?





# Donor Engagement: Best Practices

## #2 Share your message

- What communication tools do you use?
- Consider *new* communication tools.
- What are the key messages to convey through your communication?





# Donor Engagement: Best Practices

## #3 Update your progress

- Plan regular updates during the giving day to generate excitement, track your progress, and solicit more giving!
- Report how much has been raised & how many donors have participated.
- Report any prizes you've won or advertise upcoming prizes you are aiming for.





# Donor Engagement: Best Practices

## #4 Follow up

- Thank donors immediately, be specific!
- Survey donors to find out what they liked and how to improve.
- Check to see if strategies were successful.
- Report your successes to your constituents: include data, fun anecdotes, successes and lessons.
- Get people thinking about future giving days!





# Use Post Giving Day Data

- Assign someone to work with your data
- Compare the data to your goals
- Analyze data you collected on donor demographics
- Use the data in organization reports demonstrating how donor dollars make a difference.
- Share data with your Board and/or executives for future resource planning.





# Board Engagement Basics

Every organization has its own culture around interacting with the Board.

- What is your board culture and structure?
- How do you engage with your board?
  - Ask your ED: how can we engage our Board?
- What goals could you set for your Board?







# Board Engagement

- Who are your current Board members?
- What do you know about them?
- Does staff have a relationship with the Board?
- How has staff interacted with them in the past?





# Board Engagement

Considering the relationship with your Board, what asks can you make?

- Ask to talk at a Board meeting
- Assign the Board a “give or a get”
- Ask Board to create campaigns
- Ask Board to engage their networks
- Can your Board secure a match for you?





# Board Engagement Tools

- Email and letter templates to share with Board members
- Fund raising talking points that Board members can utilize
- Logos, links, banners that you can send to Board members
- Consider asking Board members to run a campaign for EBG

