



How to Win at Stewardship Using Your Bloomerang Tools

5/1/2024

Bloomerang Nonprofit Success Webinars





Today's speaker:
Rachel Muir, CFRE

When she was 26 Rachel launched Girlstart, a non-profit empowering girls in STEM in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million and was featured on Oprah, CNN, and the Today show. Today Rachel delivers workshops and a membership, League of Extraordinary Fundraisers, transforming people into confident, successful fundraisers.



Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: wine tasting & cheese plates

 @rachelmuir

www.rachelmuir.com

Town crier for donor love

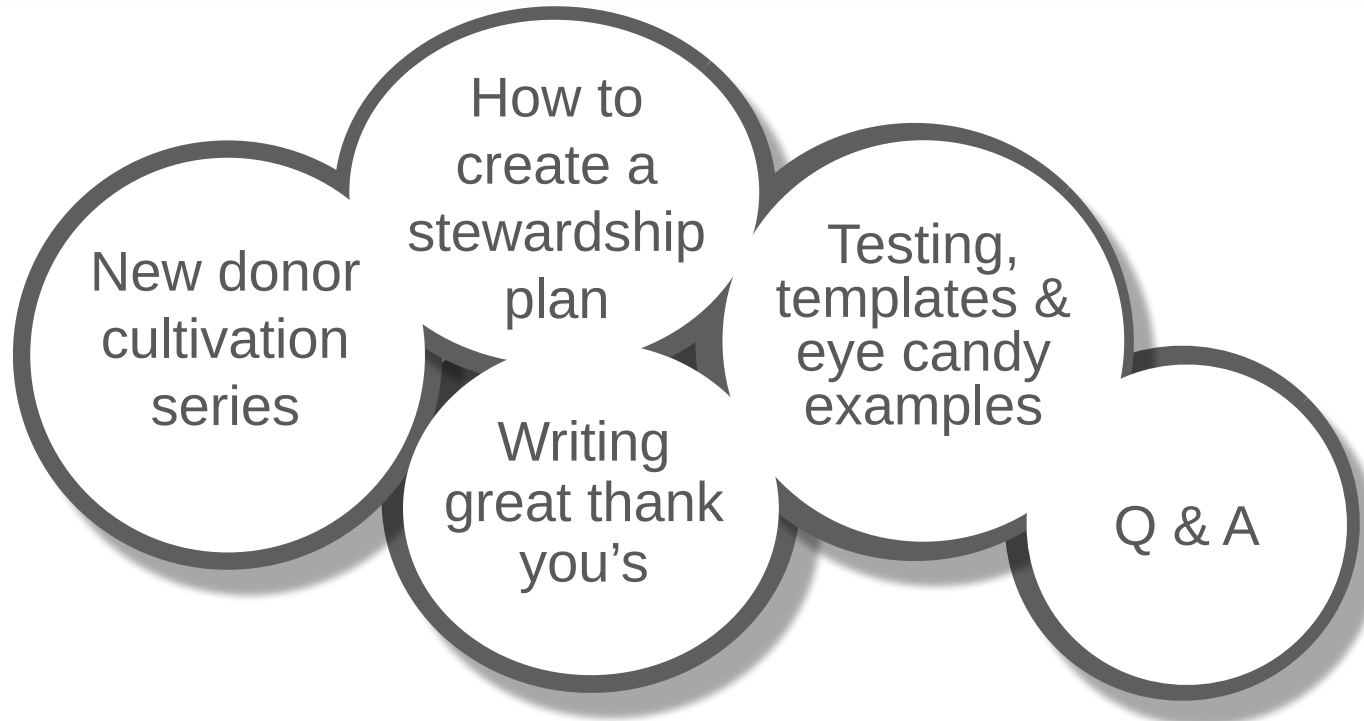


**Speaker, trainer and nationally
recognized non profit founder and
thought leader.**

GET TO KNOW RACHEL

rachel@rachelmuir.com

Slides: www.rachelmuir.com/handouts



How to Win at Stewardship Using Your Bloomerang Tools

I brought party favors!



The Do's and Don'ts of Thanking Donors



RachelMuir.com/thankyou



Why is thanking a donor so important? One word: retention. A lot of charities fail at appreciating their donors and the response is quick and severe. According to the Fundraising Effectiveness Report, only 19% of new donors will give again after their first gift.

So how do we get the second gift? Show them meaningful appreciation for their first gift. According to [Penelope Burk's annual donor survey](#), 90% of donors say that the thank you letter is the single most important and influential communication they ever receive from not-for-profits they support.

How much does saying thanks matter?

RachelMuir.com/donorlove

Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Set up Google alert, Twitter and Google+ follow, add on LinkedIn	Set up	Development Director	Immediate	✓		
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director	48 hours	✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
Thank-you letter from ED with tax info on letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
Short online survey with five questions to get to know their interests	Create and send	Development Director	Three months	✓		
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
Internal memo from ED with insider view	Write and send	CEO	Quarterly	✓	✓	✓
Invite to donor focus group	Plan and organize	Development Director	Annual		✓	✓
Card and call on anniversary of first gift "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual	✓	✓	✓
Thanksgiving thank-you call	Pull list and call	Development Director	Annual	✓		
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual	✓		
Personal note on annual report	Write	CEO	Annual			

RachelMuir.com/stewardship

Want help from Rachel?

How to Find
New Donors



May

Corporate and
Foundation
Gifts



June

Makeover My
Board



July

👉 LeagueOfExtraordinaryFundraisers.com 👈



DONOR
EXPERIENCE
RULES.

EVERYTHING
ELSE
DROOLS.

What's your post gift- communication?

Give yourself 1 point for each you regularly send.

Type your number (from 0 -11) into the chat

- Donor-centric thank you landing page
- Email thank you autoresponder
- Thank you letter
- Handwritten thank you card
- Phone call
- Text message thanking them
- Video email thanking them
- A brief update in a letter reporting back on how their gift helped (a week/month later)
- A new donor email welcome series
- A monthly donor welcome kit
- A get-to-know-you donor survey



“

It's not the frequency of the ask that's the issue; the problem is asking supporters to give again when you have not told them what you did with their last donation.

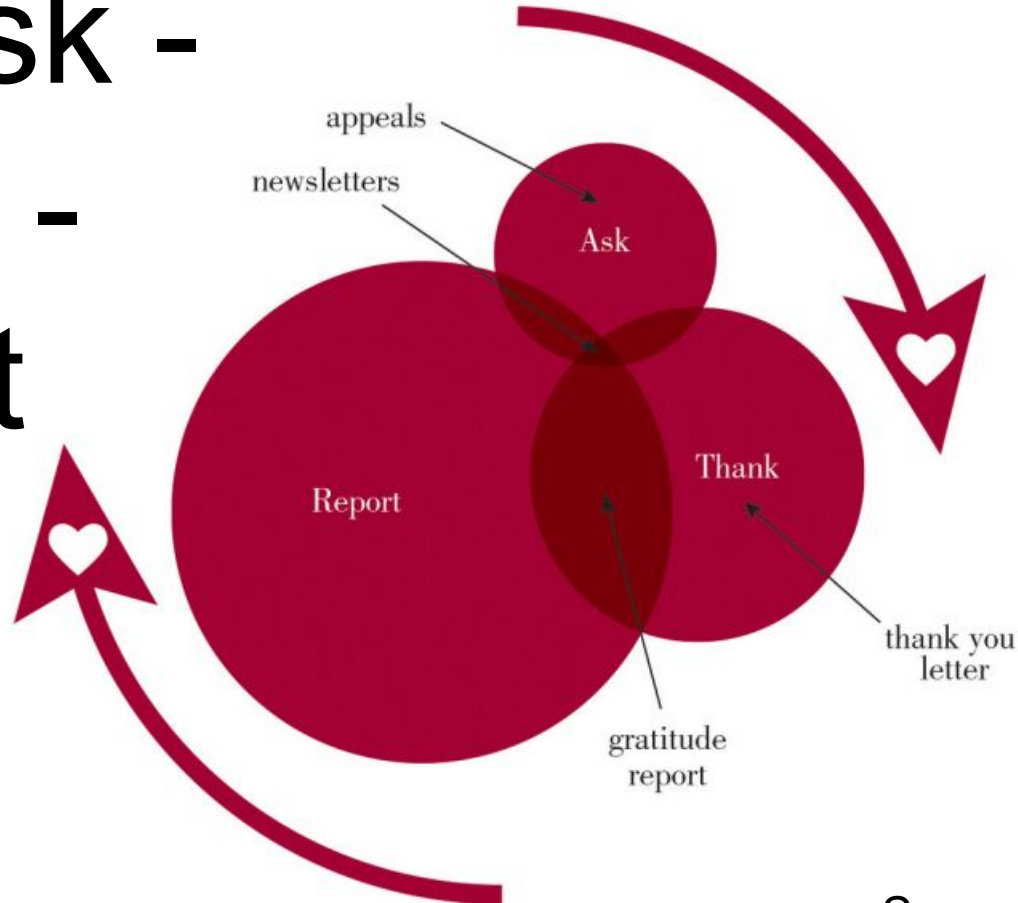
Casey Keller, GiveGab



@rachelmuir

rachelmuir.com

The Ask - Thank - Report Cycle





What donors want

- ✓ To make an impact
- ✓ To be given something tangible to support
- ✓ Be told how they made a difference
- ✓ Personalization
- ✓ Connection

Source: Lily Family School of Philanthropy 2022 “THE GIVING ENVIRONMENT: Understanding How Donors Make Giving Decisions”



What donors get

Give Give Give Give Give About us GiveGive
About us Give Give Give Give Give

Give About us Give Give Give About us Give
Give Give Give Give About us Give Give Give

More about us Give Give Give About Us Give
Give About us Give Give Give Give Give

About us Give Give Give Give

Us again GiveGive Give Ok

Thanks

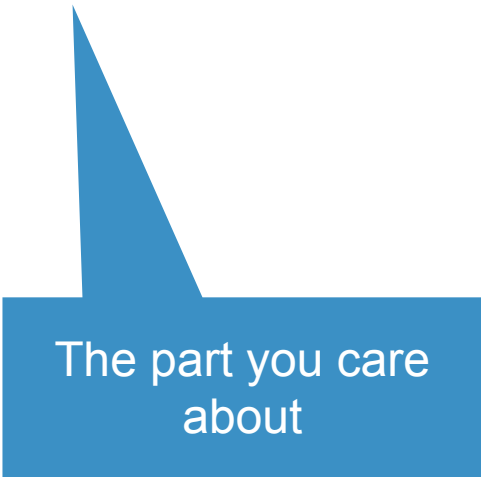
Give More us Give Give Give Give Us
Us Us Us Us Us Us Give Give

Us Us Us Us – Man, we are great – Give

TRUTH BOMB

There is no such thing as donor fatigue
IF you ask, thank and report back.

You ask. You thank. You report back.



The part you care
about



The parts your
donors care about

Download the do's and don'ts->

rachelmuir.com/thanks

Reporting back example

December 25, 2021

<First Name> <Last Name>
<Address>
<City> <State> <Zip>

Dear <First Name>,

You have no idea how much we appreciate your recent gift.

<- Thank the donor for responding

<First Name>, thank you for responding so quickly and so generously. **rapidly and generously.**

The fact you are thinking of others, <First Name>, during this worrying and difficult time speaks volumes of your kindness and compassion.

There are hundreds of kids in our community needing homework help and tutoring. Thanks to you, these kids are getting the help they need!

Your generous gift of \$ _____(amount) received on _____(date) was put to work immediately to give kids qualified tutors to help them after school with their homework.

<- Describe need facing beneficiaries & how donor met the need.

Because of you every child who needed it got assistance and support from caring adult mentors in a safe place filled with help, fun and friendship.

Here are some photos of your gift in action as the kids at Anytown Boys and Girls Club completed STEM activities and homework:

<- Short story/photo of how need was met.



<First Name> Your generous and loving heart is giving kids new skills and introducing them to lifelong mentors.

You are an important part of Boys & Girls Club of Anytown, USA.

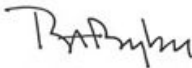
Your kindness helps kids when they need it most.

Thank you for making today - and every day - brighter for kids by giving them caring adult mentors in a safe, fun filled space.

If I can be of any service to you or show our programs in action, please to not hesitate to call or text me at (123) 456-7891.

Thanks again for being a part of our family. We're so thankful to you!

For the love of kids,




Rae Bartleby, CEO
Boys & Girls Club of Anytown USA

P.S. «FirstName» we will continue to update you on all the ways you are making a difference in our monthly email newsletter. <- ALWAYS use P.S.!

The goal: 1st gift -> 2nd/3rd -> monthly





More than 80% of
1M+ donors
started with a gift
of less than \$100

Source: Lynne Wester
[The 4 Pillars of the Donor Experience](#)

How do I move donors from \$100 to 1 million?



1) Thank and cultivate with a stewardship plan



2) Use prospect view to see causes they give to (in Bloomerang)



HOW WILL I DO IT?

STEWARDSHIP PLAN

Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
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Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
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Letter: "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
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Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual	✓	✓	✓
Personal note on annual report	Write	CEO	Annual		✓	✓

Stewardship plan:

Business rules for how donors will be thanked, acknowledged & cultivated.

Download at:
rachelmuir.com/stewardship

If you treat donors based on gift amounts (not behavior patterns or actions) you'll lose money and donors.



New Donor Cultivation Timeline (First 90 Days)

Send a signed thank you letter from the CEO or ED. (Bonus if it's handwritten)

Assuming you send a monthly newsletter, they should receive 2-3 in the first 90 days.

The end of the first 90 days is your last, best chance to acquire a larger second gift.

Donation Received!



DAY 0

Thank You Note by Mail



DAY 5

Thank You Phone Call

Research shows that retention rates improve if you call a new donor within 48 hours.

DAY 2



DAY 10



Survey

Get to know your donor while giving them a chance to offer feedback.

1st Email Newsletter



DAY 25



Tour Invitation

Give your donor an opportunity to see your operations firsthand and you give yourself an opportunity to talk to them more about your mission.

2nd Email Newsletter



DAY 50



Stewardship Mail Piece

Send your donor mail informing them just how their gift was used; make it personal and share a story from your organization!

3rd Email Newsletter



Stewardship Phone Call

Have a staff member or volunteer reach out to your donor and let them know what a difference they are making to you.

DAY 70



2nd Gift Appeal

DAY 85

Jay Barclay Love [Edit](#)

Likely UHNW

Spouse Name: Christie Love

842-1783 Purus Rd
Port St Lucie, IN 58194

Google

DS
1-1

Target Based On Giving: ?

\$5,000 - \$9,999

Target Based On Wealth: ?

Unable to Rate

Exact match as a donor giving \$5,000 or more to a nonprofit or political organization found in our giving history archive. A DS1-1 rated prospect may have markers of wealth or may only be matched to a significant giving history, and have no notable wealth markers.

Charitable Giving ?

\$19,650

Political Giving ?

\$0

Real Estate ?

\$0

SEC Holdings ?

\$0

Quality Score ?

19.1

Major Gift Likelihood ?

130

Annual Gift Likelihood ?

155

RFM Score ?

0

Profile Options...

Profile Summary

Social Discovery by Full Contact 0

Crunchbase 0/5

Crowdfunding by Donor Social 0/93

Charitable Giving 17/61

Political Giving 0/15

Real Estate 0/2

Grant-Giving 0/2

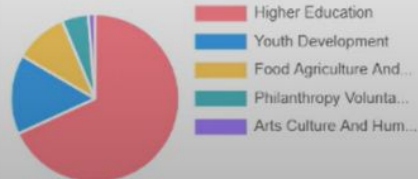
Profile Summary

Detailed Overview [Edit Section](#)

DONORSEARCH
Prospect Profile

Giving Snapshot

Giving Summary



MORE VIDEOS



Stewardship, Welcome series & Donor Journeys with Bloomerang tools

Download the sample stewardship plan ->

Q: What is the most opened email you will ever send?

A: The welcome email.

Q: What is the average open rate for a welcome email?

A: 50%

(that's 86% higher than a newsletter email)





Dear Andrea,

Welcome! You've taken the first step in helping to create economic justice for young women. 🙌

You're joining 1000s of people who want to build a feminist movement to create a society that works for young women.

We believe no young woman should be at the back of the queue as the country tries to cope with the coronavirus crisis. We're campaigning to ensure that **no young woman is left behind**.

Over the coming weeks and months, we'll be sending you updates, actions and stories directly from young women.

Together, let's make economic justice a reality.

Nadina



Nadina Kulara
Digital Engagement Officer
Young Women's Trust team

PS. If you would like to support economically vulnerable young women during these difficult times, and you feel you can, please consider **making a donation**.

Donate today



Worldreader

स्वागत ♡



We're so happy you're joining us on our journey.

Thank you for believing in a better world, a world where everyone has access to the books they need to live healthier, more prosperous lives.

So far, we're 15 million down, 985 million to go.

Supporters like you help us reach more readers every single day. So thank you for being here. A huge welcome from the whole Worldreader family



Andrea, we're so glad you're with us.

We're a group of conservation advocates – attorneys, engineers, policy experts, and other committed professionals – working hard to solve the greatest environmental challenges facing this region we love and call home.

Thanks to advocates like you, we're better equipped for this critical work.

Let us know which issue area you're most excited to hear about.

Land | Air | Water

We'll keep you updated so you're ready to act when and where we need it most.

Thanks for signing on to the protect the West,

Abby Kuranz
Digital Marketing Manager
Western Resource Advocates

PS. Want to make sure our emails land in your inbox? Add outreach@westernresources.org to your contact list or address book.

INCREASE YOUR SUPPORT

Follow us on social!



2260 Baseline Road, Suite 200, Boulder, CO 80302 303.444.1188

You are receiving this email because you have subscribed to updates from Western Resource Advocates. If you believe you received this message in error or wish to no longer receive email from us, please [unsubscribe](#).

[Western Resource Advocates](#)

*WRA does most of its communications by email. We will not share your email

A photograph of a person from behind, wearing a light-colored t-shirt with the text 'REVITALIZING NEIGHBORHOODS BLOCK BY BLOCK' and a logo. They are holding the hand of a young child. They are walking on a city street with buildings and parked cars in the background. The entire image is overlaid with a semi-transparent green filter.

Feed My Starving Children

volunteer stewardship emails



Thank you!

Dear Jeannine,

Thank you for volunteering with Feed My Starving Children on Thursday, June 29, 2023 from 11:30 a.m. to 01:15 p.m.! The meals you packed will feed kids, feed spirits and empower communities around the world.

Don't stop now. Will you take the next step?

- **Donate today.** If you haven't yet made a donation to help cover the costs of the meals you packed, please consider making an [online gift](#) now.

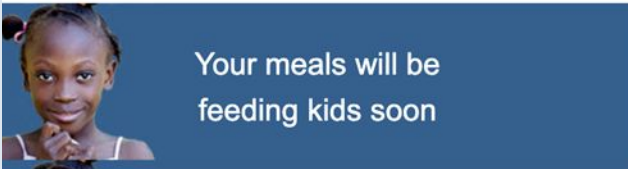
\$106 Feeds a child for a year	\$424 Feeds a family for a year	\$2,255 Feeds a classroom for a year	Other Everything helps
--	---	--	----------------------------------

- Join a community dedicated to providing reliable meals and hope — month after month. [Join Something Greater >](#)
- [Volunteer again.](#) We hope to see you again soon so we can keep feeding kids.
- [Shop FMSC MarketPlace.](#) Purchasing handcrafted items supports our artisan partners and funds FMSC meals.
- [Stay connected. Read stories of hope on the FMSC blog.](#)
- Looking for a way to use your skills to end hunger? Join our team. We're hiring! fmsc.org/careers

On behalf of children around the world, thank you!

We hope you enjoyed your volunteer experience. Please share your thoughts and comments by [taking our survey](#).

Mark Crea,
Executive Director/CEO
Feed My Starving Children



Your meals will be feeding kids soon

Dear Jeannine,

The meals you packed at our Coon Rapids, MN location on June 29, 2023 were shipped to:


- [Food for the Poor](#) in Guyana on Tuesday July 11, 2023
- ForAfrika in Angola on Friday July 14, 2023

Precious children will be eating a nourishing meal soon because of you. Thank you. You've made an incredible difference.

Did you know? Meals usually take between two weeks and six months to travel to their destination. It all depends on where in the world they go and how hard it is to get there. They cross the ocean by ship or plane and wait in line to clear customs. Then they journey by car, bike, canoe or even donkey to reach our partners. Many hands carry these meals to children and families in need.

[Volunteer again >](#)

[Fund the meals you packed >](#)



Your meals are feeding kids

Dear Jeannine,

The meals you packed at our Coon Rapids, MN location on June 29, 2023 arrived in Guyana on September 04 to help kids fed by [Food for the Poor](#).

Precious children are eating a nourishing meal because of you. Thank you. You've made an incredible difference.

Did you know? Meals usually take between two weeks and six months to travel to their destination. It all depends on where in the world they go and how hard it is to get there. They cross the ocean by ship or plane and wait in line to clear customs. Then they journey by car, bike, canoe or even donkey to reach our partners. Many hands carry these meals to children and families in need.

[Volunteer again >](#)

[Fund the meals you packed >](#)



Know your donor audience:
1st time, monthly, bereaved etc.

Download the do's and don'ts->

rachelmuir.com/thanks

First time donor thanks

Monthly donor thanks

Sample New Donor Letter Example:

Dear John,

I am overjoyed to see such a generous first-time gift from you, and I am honored to welcome you into our donor family.

Mr. Pickles is one of 200 dogs we will rescue this year. Mr. Pickles is a terrier/pit bull mix dropped off at our doorstep howling and limping because of an infected paw. He was malnourished, afraid of people, and in incredible pain.



Mr. Pickles

John, you know that no dog is beyond hope. When we looked at Mr. Pickles, we knew he was an amazing dog. Even in pain, he took treats from our staff and wagged his tail. He received emergency surgery from our vet clinic and was rehabilitated by our expert staff. Today, he's receiving daily obedience training classes from volunteers and spends time snuggling with our Development staff in between meetings.

Your generosity and commitment to helping dogs like Mr. Pickles is what enables us to rehabilitate and adopt out hundreds of dogs each year. Thank you so much – on behalf of Mr. Pickles and all the dogs we serve – for believing in second chances. We couldn't do this without you!

For the love of animals,

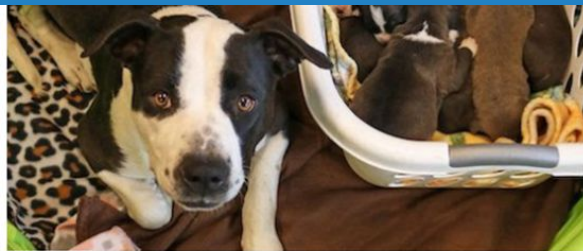
Person's name & title

P.S. Please call me at (512) 452-1746 if you'd like to stop by the shelter and meet Mr. Pickles or one of our other amazing dogs or cats and see your donation at work!

Donation Receipt – Keep for your records

Organization: Anytown Pets Rescue
Date Received: June 10, 2017
Gift amount: \$25
Tax ID: 57-8675309

Anytown Pets Rescue is a 501c(3) nonprofit organization. Your donations are tax deductible to the extent allowed by law. No goods or services were exchanged in return for this contribution.



Thank you, Rachel!

We are facing very uncertain times right now. But with your steadfast support, we will continue to serve the neglected and homeless animals who depend on kind-hearted people like you.

The homeless animals in our community, like Maggie and her babies (pictured), needed you to provide essential care and you opened your heart. Our team is dedicated to doing all we can to help as many as we can with all the resources we have, but we cannot do our work without YOU. The majority of our financial support comes from YOU, our friends in the local community, and your support is appreciated more than ever during this time of uncertainty.

Rachel, THANK YOU SO MUCH – on behalf of Maggie and all the abandoned, unloved animals we serve – for staying the course with us. I am so incredibly grateful and humbled by your big-heart and wish all the best for you and your loved ones now and always.

Sincerely,

Sam & the Rescues!

Development Director



Samantha "Sam" Threadgill,
Development Director

A: 845 W. Ridge Road
Gainesville, GA 30501

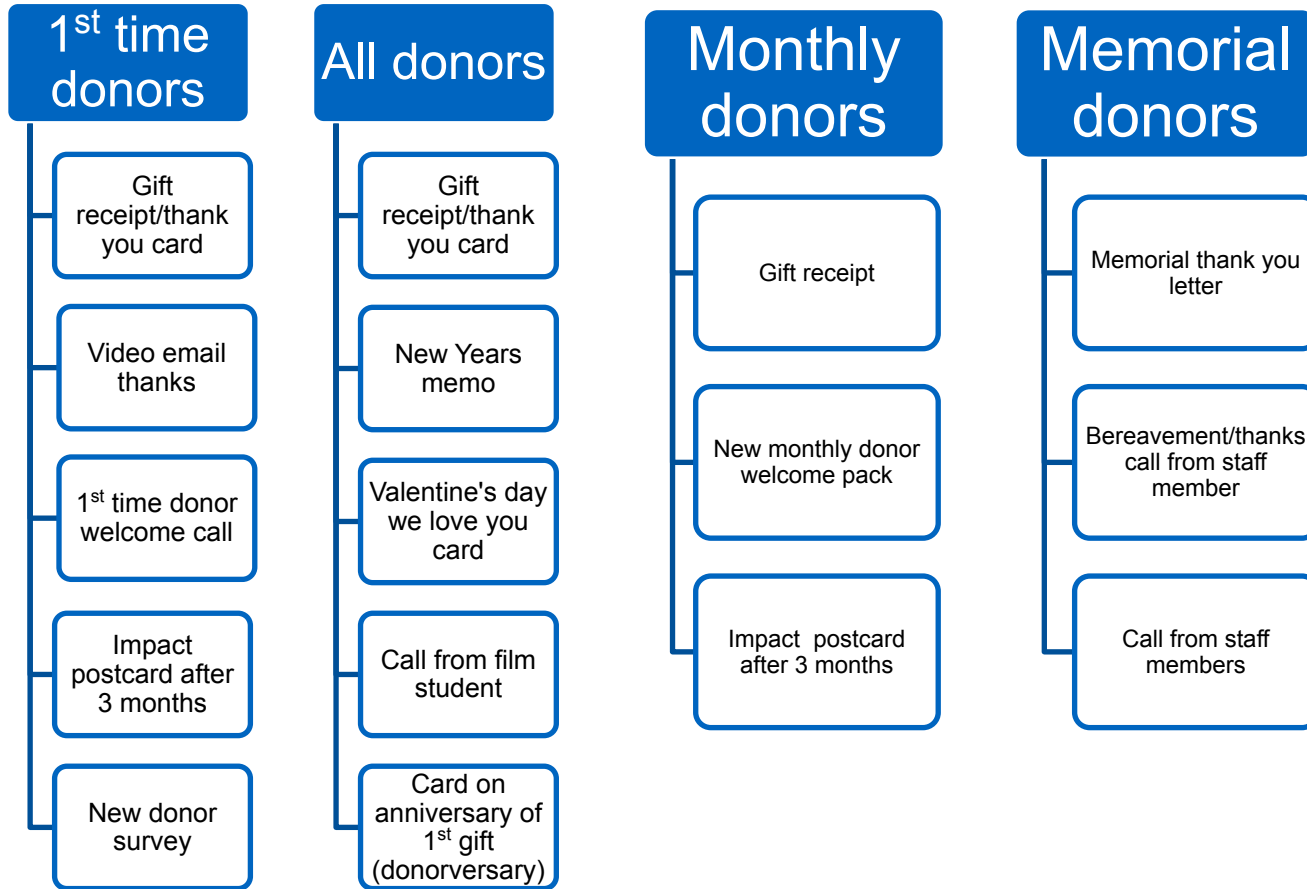


Lapsed donor thank you



Source: The Donor Relations Group

Steward by behavior/longevity (not \$)





ON AIR

THANK YOU

MAKEOVERS

Test your donor centered copy – for free!

Enter or paste text to analyze

[Copy text](#) [Analyze](#)

Dear First Name,

When Maria, Diego and Kevin ask, Why can't I go to preschool today? the response comes with complicated words like: quarantine, coronavirus, and furlough. It's a complicated and uncertain time for everyone. And we know it is especially confusing for children who long for stability, familiarity, and routines of playing with friends.

Frankly, even we aren't absolutely sure when the Children's Learning Center will reopen, although we are aiming for mid-June -- a full three months since the coronavirus forced the Children's Learning Center, along with all schools and businesses in Vermont, to close for an undetermined length of time.

What we do know for sure is that we need your support now, like never before, to be able to give children a clean, sanitized and safe environment, in classrooms and on the playgrounds, where they can be virus-free from the moment they walk in the door to the moment they leave at the end of the day.

Before we can open the doors, we need to undertake some costly, thorough disinfecting of every room and every surface. And we'll need extra supplies to be able to do it again every day, several times a day.

It will require a new level of hyper vigilance and extra effort, on the part of teachers, parents, staff and even children. It will take a greater investment in extra safety materials like thermometers, plastic gloves, and gallons more soap and boxes more paper towels.

Results

3230	Characters	2'22*	Reading Time
532	Words	25	Sentences

The "You" Test

You used "you" words 4 times and "we" words 10 times. Ideally, you should use twice as many "you" words as "we" words. [Learn more](#)

Reading Level 11th grade

Your text is likely to be understood by a reader who has a least a 11th-grade reading level. The text should be between a 6th and 8th grade reading level and should be easy for most adults to read.

This is based on the Flesch-Kincaid reading levels. [Learn more](#)

www.bloomerang.co/commsaudit

Which thank you makes you happier?



Thank You for Your Recurring Donation

You have helped us continue our mission in a meaningful way.

DONATION RECEIPT



Girlstart

You just did a great thing: you are helping girls be bold and brave.

You are empowering girls through innovative STEM educational programs that meet girls where they are and help them find new insights, through STEM.

Girls who otherwise might not be encouraged to try something new.

Girls who might otherwise miss out on the opportunity of learning how to code.

How to build. How to dissect. How to explore.

Your kindness and compassion is showing these girls how to pick themselves back up again, and redesign, when things don't go as expected.

Thank you!

BEFORE



7/2/2019

Rachel Muir
4905 W Frances Place
Austin, Texas 78731

Dear Rachel,

Thank you for your very generous gift of \$5,000 received on July 2nd, 2019. We consider it a privilege to be able to evolve to meet the growing needs of our community. We look forward to continuing to utilize affordable housing solutions to help empower those we serve. We are so thankful for your continued support of Habitat Cabarrus.

This year we continue to provide much needed services to families through new construction, transitional housing and critical home repairs. Having a decent affordable place to live is a critical part of helping families to build a better future. In turn these families then help create a more stable community. We are committed to continuing to serve the growing housing needs in Cabarrus County.

*"The rung of a ladder was never meant to rest upon, but only to hold a man's foot long enough to enable him to put the other somewhat higher."
-Thomas Huxley*

We are able to serve families because of the support of donors like you. Thank you for investing in the future of Cabarrus County through Habitat Cabarrus and for being the rung on a ladder for the families we assist.

In Habitat Partnership,

██████████
Executive Director

██████████
Resource Development Director

Habitat for Humanity Cabarrus County is a 501 (c) (3) non-profit tax-exempt organization, Federal Tax ID #56-1678395. No goods or services were provided in return for this donation. Please keep this written acknowledgment of your donation for your personal records.

Boring predictable start

Donor is middleman - org is hero

No emotion, invite to get more involved or info on when I'll hear from them next

Loaded with "We" org-centric language

Uses 'you' words 5 times and 'we' words 9 times.

Donors want to feel like they're more than a 'rung on a ladder'

AFTER

General Thank you rewrite

Dear Rachel,

One day everything was fine for Odessa. She had a life, a plan, a house and a loving husband.

The next day she was a widow with no income and no home.

Odessa was able to rent a single room in a home but wasn't allowed to use the kitchen and had to cook all her meals in a microwave in her bedroom and vacate her room if her landlord had guests.

Thanks to you, today she has a home of her own.

Because of your kind heart families all over Cabarrus county are finding homes and hope.

Your kindness and support are giving Odessa financial literacy classes helping her build her future.

Because of you home ownership is finally in her grasp!

On behalf of Odessa and the families we serve in Cabarrus county we thank you for your generous donation of \$5,000 received by Cabarrus Habitat on July 10, 2019.

Your gift is transforming lives. Thank you for building homes and hope for Odessa. We couldn't do it without you, Rachel!

P.S. Please call me at (512) 452-1746 if you'd like to stop by a build to meet other amazing clients and volunteers just like Odessa and see your donation at work!

In Habitat Partnership,



Julie Page
Executive Director



Stephanie Jones
Resource Development Director

Habitat for Humanity Cabarrus County is a 501 (c) (3) non-profit tax-exempt organization, Federal Tax ID #56-1678395. No goods or services were provided in return for this donation.

Opens with
immerse
storytelling

Gives donor
credit - uses
you 10 times
and 'we'
words 4 times

Scanned
signatures



... Client close
up looking at
camera

Leverages P.S.
with special
invite

Instead of this...

**Speaking to what
their donation
can do.**



Do this instead:

**Speak to
who the donor IS.**

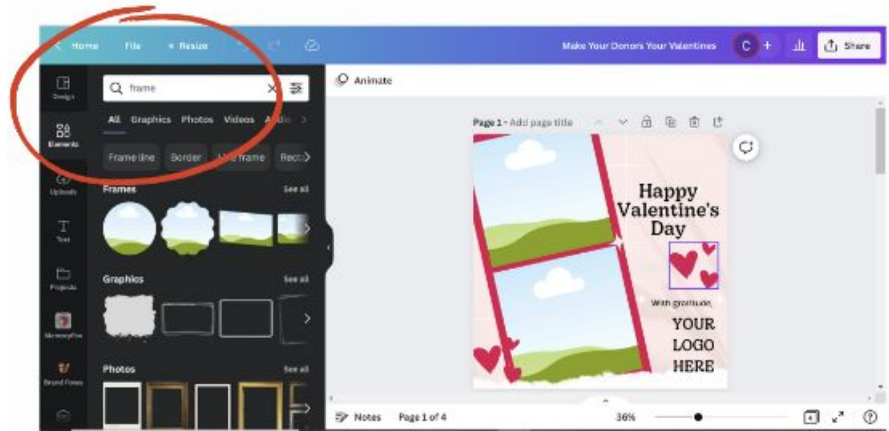




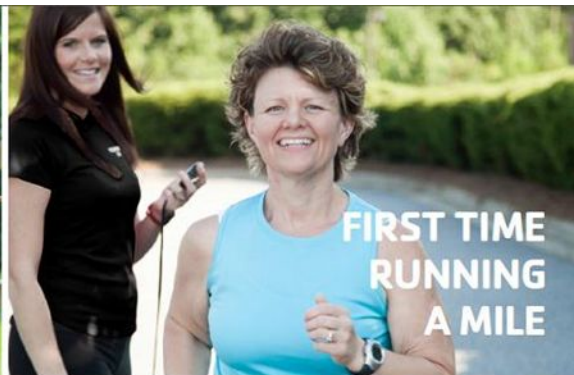
RACHEL'S STEWARDSHIP

HALL OF FAME

[Memory Fox](#) offers a '12-months of gratitude' set of [Canva templates](#) you can download, ready for you to drop in your photos and videos.



memoryfox.io/make-your-donors-your-valentines



@rachelmuir

www.rachelmuir.com



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

**“Firsts” happen every
day at the Y.**

**Thank you for making your
first gift, so their firsts
could happen too.**

YMCA of Northwest North Carolina
Our Mission: “Helping people reach their God-given
potential in spirit, mind and body.”

A United Way Agency.

YMCA of Northwest North Carolina
301 N. Main Street, Suite 1900
Winston-Salem, NC 27101

Non-Profit Org.
U.S. Postage
PAID
Winston-Salem, NC
Permit No. 272

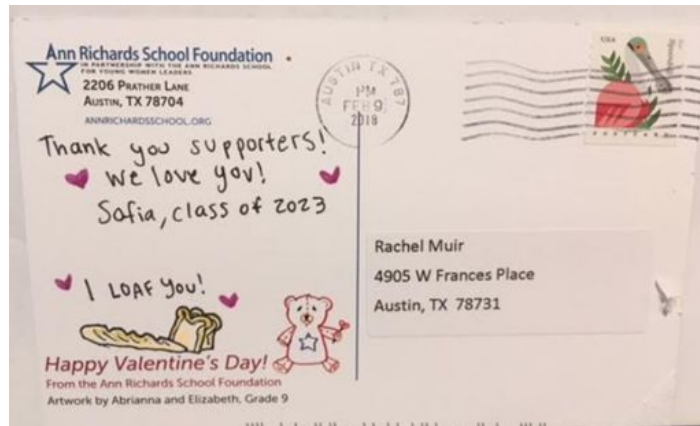
Rachel
MUIR

Download the sample stewardship plan -> rachelmuir.com/stewardship

Thank you's that got noticed



*Thanks for always
"jumping in" with
ForLife!*



Email thank you autoresponder with photo




Wow! Thank you



Inbox x



 **Christopher Aaby** <lgiforms-submissions@littlegreenlight.com>

Sep 22 (5 days ago) ☆



to rachel ▾

Dear Rachel,

Thank you for your generous support of Catamount Institute. Your recent contribution of \$25.00 helps to ensure that students like Kelsey (pictured) have access to high-quality outdoor education experiences.

It is only through the continued generosity of good friends like you, we are able to achieve our mission. Because of your generosity and thoughtfulness, underserved children in our community will have the opportunity to connect with nature

Thank you!

Warm Regards,

Christopher Aaby
Executive Director
[719-471-0910 x106](tel:719-471-0910)



Thank you for being a valued supporter of Catamount Institute. Catamount Institute is a 501(c)3 nonprofit organization. Your contribution of \$25.00 is tax-deductible to the extent the law allows. No goods or services were received in return for this gift. Please retain this letter as a receipt of your charitable gift.

“

The lowest hanging fruit in digital fundraising
is the anniversary of your donor's first gift.”

Mark Rovner, Sea Change Strategies

Download the do's and don'ts->

rachelmuir.com/thanks

“Donorversary” postcard



“Donoriversary” postcard back



WE'RE CELEBRATING THE ANNIVERSARY OF THE DAY YOU SAID I DO!

- I do...want to feed a hungry rescue!
- I do...want to save a litter of puppies or kittens!
- I do...want to help spay or neuter!
- I do...want to save healthy animals from dying in a high kill shelter!

Thanks to you, homeless animals like Walker, who came to us with two broken legs and was barely able to walk, got lifesaving surgery and a forever home. He can now be seen chasing balls at the dog park with his new family.

On behalf of all the animals you helped rescue, Happy Anniversary!



845 West Ridge Road, Gainesville, GA 30501
HSNEGA.org | facebook.com/HSNEGA
instagram @humanesocietynega
twitter @HSNEGA | 770-532-6617

**Greatest gift you can give
a donor is the gift of being
known by you**

Want help from Rachel?

How to Get
Planned Gifts



April

Launch a Capital
Campaign



May

How to do a
Donor Survey



June

👉 LeagueOfExtraordinaryFundraisers.com 👉

I brought party favors!



The Do's and Don'ts of Thanking Donors



RachelMuir.com/thankyou



Why is thanking a donor so important? One word: retention. A lot of charities fail at appreciating their donors and the response is quick and severe. According to the Fundraising Effectiveness Report, only 19% of new donors will give again after their first gift.

So how do we get the second gift? Show them meaningful appreciation for their first gift. According to [Penelope Burk's annual donor survey](#), 90% of donors say that the thank you letter is the single most important and influential communication they ever receive from not-for-profits they support.

How much does saying thanks matter?

RachelMuir.com/donorlove

Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Set up Google alert, Twitter and Google+ follow, add on LinkedIn	Set up	Development Director	Immediate	✓		
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director	48 hours	✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
Thank-you letter from ED with tax info on letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
Short online survey with five questions to get to know their interests	Create and send	Development Director	Three months	✓		
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
Internal memo from ED with insider view	Write and send	CEO	Quarterly	✓	✓	✓
Invite to donor focus group	Plan and organize	Development Director	Annual		✓	✓
Card and call on anniversary of first gift "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual	✓	✓	✓
Thanksgiving thank-you call	Pull list and call	Development Director	Annual	✓		
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual	✓		
Personal note on annual report	Write	CEO	Annual			

RachelMuir.com/stewardship

How can Bloomerang tools help you accomplish your stewardship goals?

Phone calls

- Personal thank you call within 48 hours are **4x more likely to give a second gift.**
- Thank you call from board member to a newly acquired donor within 24 hours will **increase their next gift by 39%.**
- Bloomerang customer study first-time donor calls increase:
 - **Retention** (8% increase)
 - **Second gift amount** (nearly double)
 - **Speed to second gift** (44 days faster with one call)

(Check out the [linked article](#) to see how making *more than one call* impacted the numbers in our Bloomerang study!)

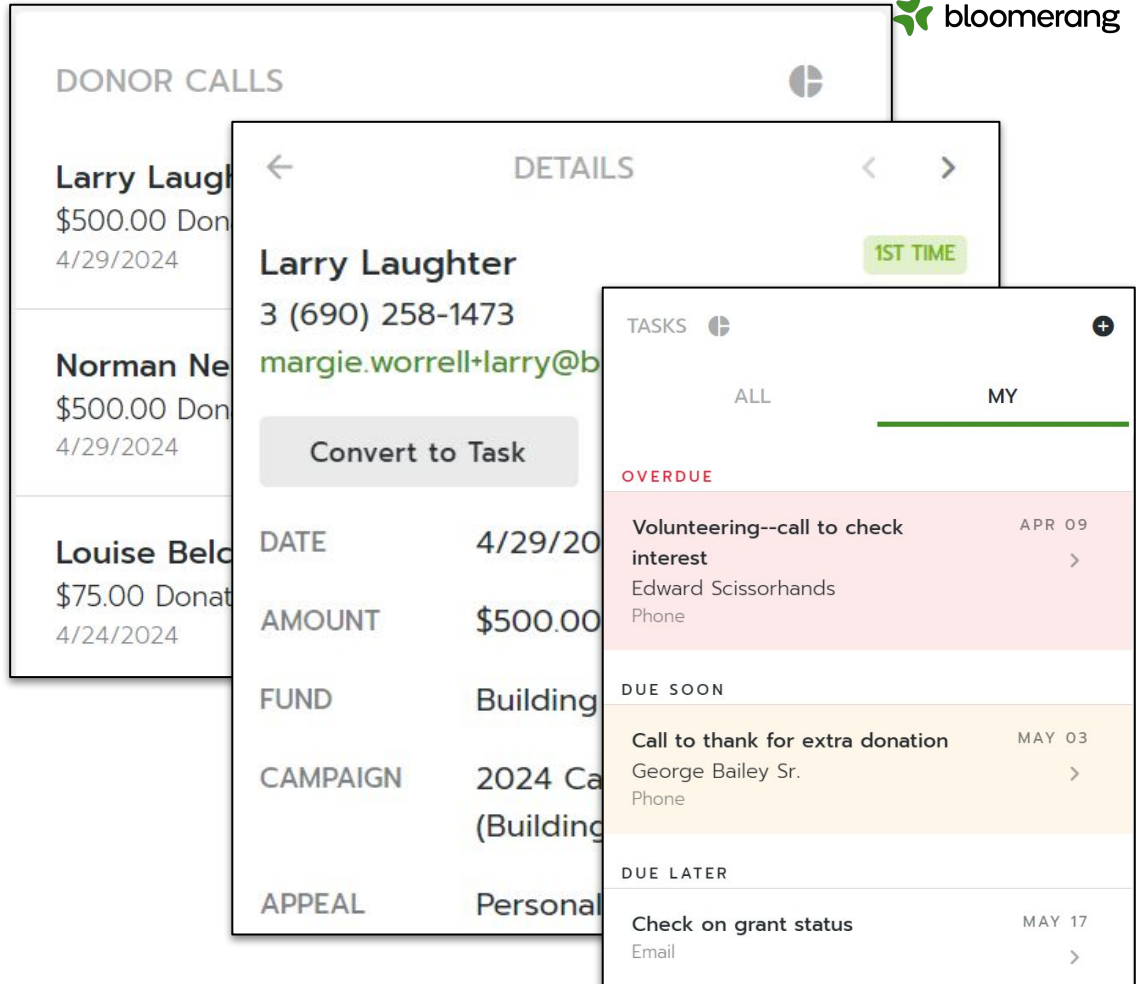
Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Invite to network on LinkedIn with a personal note, follow on Twitter	Set up	Development Director	Immediate	✓		
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director	48 hours	✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
Thank-you letter from ED with tax info on letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter: "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
Short online survey with three to five questions to get to know their interests	Create and send	Development Director	Three months	✓		
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
Internal memo from ED with insider view	Write and send	CEO	Quarterly	✓	✓	✓
Invite to donor focus group	Plan and organize	Development Director	Annual		✓	✓
Card and call on anniversary of first gift: "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual	✓	✓	✓
Thanksgiving thank-you call	Pull list and call	Development Director	Annual	✓	✓	✓
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual	✓	✓	✓
Personal note on annual report	Write	CEO	Annual		✓	✓
Video clip of emotional story	Produce and email	Development Director	Semiannual	✓	✓	✓
Invite to special event	Produce and email	Development Director	Annual		✓	✓
Personal thank-you story from a volunteer at shelter, vet or adopter.	Identify, give stationary and mail	Development Director	Semiannual	✓	✓	✓
Holiday cards	Put together mailing list	Development Director	Send in November	✓	✓	✓
Donor listing in The Scoop Annual Report	Run report	Development Director	Annual	✓	✓	✓
Invite to Wine and Whiskers donor appreciation event.	Plan and organize	Development Director	Annual	✓	✓	✓



Tools to help with calls to donors

- First-time donor calls on dashboard
- Tasks section with reminders sent to assignee



DONOR CALLS

Larry Laughter \$500.00 Donated 4/29/2024
Norman Ne... \$500.00 Donated 4/29/2024
Louise Beld... \$75.00 Donated 4/24/2024

DETAILS

Larry Laughter
3 (690) 258-1473
margie.worrell+larry@bloomerang.org
1ST TIME

Convert to Task

DATE	4/29/2024
AMOUNT	\$500.00
FUND	Building
CAMPAIGN	2024 Campaign (Building)
APPEAL	Personal

TASKS

ALL | MY

OVERDUE

- Volunteering--call to check interest Edward Scissorhands Phone APR 09

DUE SOON

- Call to thank for extra donation George Bailey Sr. Phone MAY 03

DUE LATER

- Check on grant status Email MAY 17

Email reminders keep you and your teammates on task!



Hi, margie.worrell,

You assigned yourself the following task in Bloomerang:

- Subject: Get donor list from Amy
- Due Date: 4/18/2023
- Purpose: Impact/Cultivation
- Channel: In Person
- Note:

Go by Amy's office to pick up donor list.

Reply to this email to mark this task as Completed in Bloomerang. Any text you add in the reply will be captured on the completed task.

If you need more information, [click here](#) to open this task in Bloomerang.

You may also [click here](#) to manage your task notification emails going forward.

Keep up the good work!

— Team Bloomerang



Hi, margie.worrell,

You assigned yourself the following task in Bloomerang:

- Subject: Call the venue for the gala
- Due Date: 4/20/2023
- Purpose: Special Event
- Channel: Phone

Reply to this email to mark this task as Completed in Bloomerang. Any text you add in the reply will be captured on the completed task.

If you need more information, [click here](#) to open this task in Bloomerang.

You may also [click here](#) to manage your task notification emails going forward.

Keep up the good work!

— Team Bloomerang

Communicate and Invite

How many of these items have to do with **communicating and inviting** people in?

Why donors keep giving (2011 DonorVoice)

1. Donor perceives organization to be effective
2. Donor knows what to expect with each interaction
3. Donor receives a timely thank you
4. Donor receives opportunities to make views known
5. Donor feels like they're part of an important cause
6. Donor feels his or her involvement is appreciated
7. Donor receives info showing who is being helped

Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONORS	2ND SET	3RD SET
Invite to network on LinkedIn with a personal note, follow on Twitter	Set up	Development Director	Immediate	✓	✓	✓
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director		✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO		✓	✓	✓
Thank-you letter from ED with tax info in letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter: "You've only been supporting us one month and already our gift has..."	Create and send	Development Director	3 months	✓	✓	✓
Short online survey with three to five questions to get to know their interests	Create and send	Development Director	Three months	✓	✓	✓
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual	✓	✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual	✓	✓	✓
Internal memo from ED with inside view	Write and send	CEO	Quarterly	✓	✓	✓
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Card to call on anniversary of first gift: "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual	✓	✓	✓
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Personal note on annual report	Write	CEO	Annual	✓	✓	✓
Video clip of emotional story	Produce and email	Development Director	Semiannual	✓	✓	✓
Invite to special event	Produce and email	Development Director	Annual	✓	✓	✓
Personal thank-you story from a volunteer at shelter, vet or adopter	Identify, give stationary and mail	Development Director	Semiannual	✓	✓	✓
Holiday cards	Put together mailing list	Development Director	Send in November	✓	✓	✓
Donor listing in The Scoop Annual Report	Run report	Development Director	Annual	✓	✓	✓
Invite to Fine and Whiskers donor appreciation event	Plan and organize	Development Director	Annual	✓	✓	✓

Rachel calls out communicating and inviting **11 times!!**





Thank YOU!

Ivy, thank you for your generous gift of \$100.00 on 4/30/2024!

Because of your generous support, our animals will be warm and cozy. It's people like you that the creatures in our care depend on, and we couldn't do it without you.

Would you like to lend a hand with our mission?

Our orangutans love making friends, and we depend on volunteers for everything from feeding, administrative tasks, cleaning, and cuddling.

Visit our [Volunteer Center](#) on our website!



Our Contact Information
Bloom Community Center
5724 Birtz Road
Indianapolis, IN 46216
8003322969
<https://life.com.cco.bloomerang.co/>

Thank you for your continued support.

Blossom Orangutan

Tools to help with communication

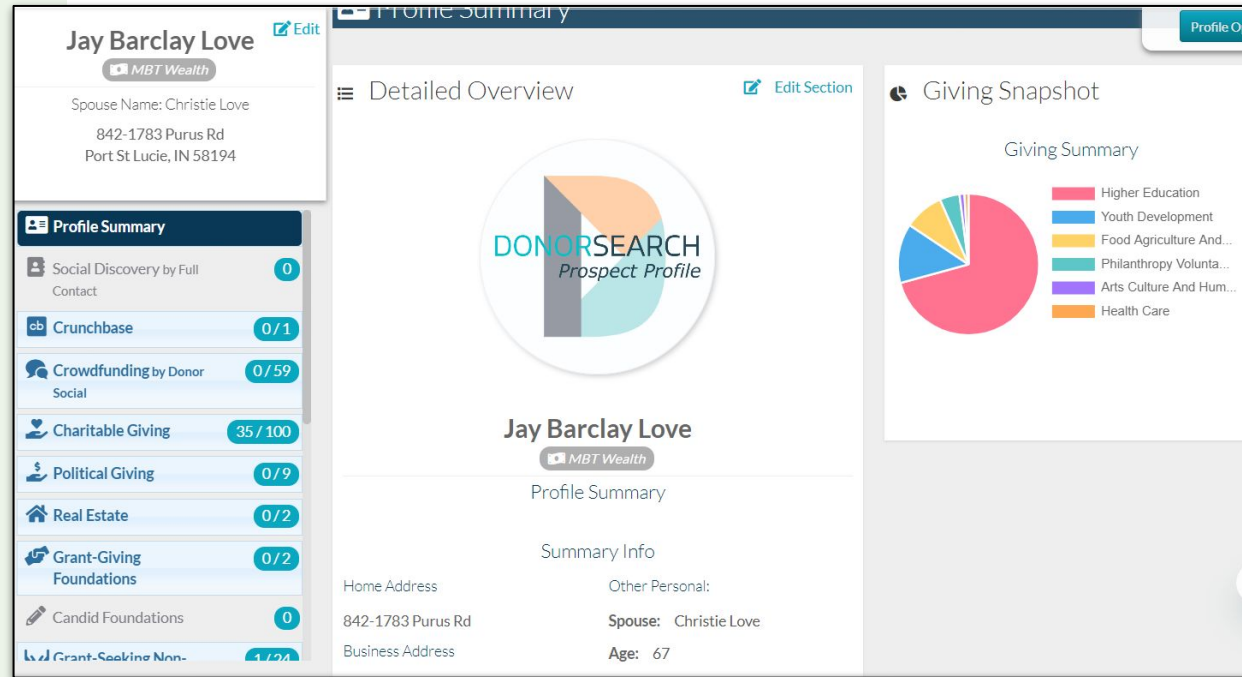
- Robust email functions with many possibilities
- Start-to-finish letter writing/sending
- Using filters helps you segment your communication

The screenshot shows the Bloomerang email management interface. The top navigation bar includes the Bloomerang logo, a search bar for constituents, and utility icons. The left sidebar lists navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Letters, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled 'Edit Email' for an 'Education Newsletter'. A yellow notification banner states: 'Monthly Email Scheduled for Friday, May 3, 2024 9:00 AM. Any changes made to the design or filters of this email template will affect the scheduled email. Click Save and Preview to edit or delete the schedule.' Below the notification are tabs for 'Design', 'Filter', 'Details', and 'Tracking'. A section titled 'Use these tools to check your email prior to sending' includes links for 'Get HTML', 'Preview Layout', 'Send Test', and 'Readability Test'. The email preview shows a video of a classroom with a teacher and students, and the text 'This Month's Education Wrap Up'. A right-hand sidebar contains a 'CONTENT' panel with options for 'IMAGE', 'BUTTON', 'DIVIDER', 'SOCIAL', 'HTML', 'VIDEO', and 'TEXT'. At the bottom, a 'Chat with Us' button is visible.

Donor Stewardship Plans

Enter into building this relationship with **intention**.

- Create a roadmap for the journey using insights from DonorSearch
- Generosity score gives you quick information at a glance
- Invest in deeper prospecting tools as needed to gain even more data for prospecting



Jay Barclay Love MBT Wealth

Spouse Name: Christie Love
842-1783 Purus Rd
Port St Lucie, IN 58194

Profile Summary

- Social Discovery by Full Contact: 0
- Crunchbase: 0/1
- Crowdfunding by Donor Social: 0/59
- Charitable Giving: 35/100
- Political Giving: 0/9
- Real Estate: 0/2
- Grant-Giving Foundations: 0/2
- Candid Foundations: 0
- Grant-Seeking Non-Profits: 1/24

Detailed Overview Edit Section

DONORSEARCH
Prospect Profile

Jay Barclay Love
MBT Wealth

Profile Summary

Summary Info

Home Address: 842-1783 Purus Rd
Business Address: [Redacted]

Other Personal:
Spouse: Christie Love
Age: 67

Giving Snapshot

Giving Summary

- Higher Education
- Youth Development
- Food Agriculture And...
- Philanthropy Volunta...
- Arts Culture And Hum...
- Health Care

COMBINE THE POWER OF GIVING+ AND DONORSEARCH

Raise More Online

Customers like you have:

- **Increased recurring donations by 25%** with recurring donation prompts
- **Grown their donor base by 11%** year-over-year
- **Received 50% higher one-time gift amounts** than the industry average



Poll and Q&A



Want to find out more?

[Request a demo](#)

or

Speak to a live
person:
[1-866-667-4485](tel:1-866-667-4485)

Resources


[Actually, Calling Donors To Thank Them Does Make Them More Likely To Give Again \(And Give More\)](#)

[How to Assess When a Major Donor is Ready \(or Not Ready\) to Be Asked](#)

[Donor Stewardship: Expert Tips To Build Strong Relationships](#)

[Ramp Up Your Stewardship Program Before Year-End Gifts Arrive](#)





**Thank you for being
here today!**

And thank you for the
work you do in your
community!

