Fifty Ways To **Service** Your Donor

Handout for "The Power of Love in Major Gifts Development" Cindy Niemi, CFRE, MultiCare Health Foundation Jan F. Brazzell, PhD, ACFRE, Advancement Consulting

Loving your donor can be easy if you know them. The first step in loving your donor is to pay attention to who they are, listen to their history and what they enjoy doing, and learn where their heart lies in giving back. This is where you begin. The following are ways you can gain and share mutual love with your donor.

- 1. Share stories on how their gift is making an impact. Personalize the way you share this with a special letter, email, or phone call.
- 2. Bring them their favorite drink each time you see them (latte, italian soda, etc.).
- 3. Know what they like to do. If they are athletic, ask them to join you for a walk. If they like to go out to eat, take them to lunch or dinner. If they don't like to eat out, offer to bring lunch to them.
- 4. Tell them about new projects your agency is working on.
- 5. Ask if they would like more information and what is the best way to share this, (i.e. a tour, a case statement and packet mailed to them, send specific outcome statistics, success stories, etc.).
- 6. Ask <u>how</u> they want communication to come to them from your agency (email, letter, phone call, newsletter, social network site of their preference, etc.).
- 7. Ask <u>how often</u> they would like communication.
- 8. Once they share how they want to be communicated with and how often, do as they request.
- 9. Try to go to them. Face-to-face visits are always best whether it's in their home, office, coffee shop, or on a tour of your facility.
- 10. Invite them to a special event that you know, from listening to them, that they would love.
- 11. Offer to drive them to the event if they are unable to.
- 12. Make your invitations personal by following up with a phone call.
- 13. Offer them a tour to see the specific cause they have given to.
- 14. If you can't show them the cause "in action", show them your facility and introduce them to your Executive Director and/or Board members.
- 15. Bring them something fun periodically when you meet with them like a keychain with your logo on it or a souvenir you purchased for them on your latest trip.
- 16. Call them for advice or their opinion on an opportunity you are developing.
- 17. Be sure that you have passion for your cause. Continue to feed your heart with your cause so you can, in turn, share this passion with your donors.
- 18. When appropriate to the donor, send meaningful cards on their significant dates birthday, anniversary, death of their loved one, promotion, etc.

- 19. If you know this is important to them, offer ways for hands-on involvment, (i.e. sit on the board, volunteer directly with clients if appropriate, volunteer for a task, volunteer with the clients, etc.).
- 20. Thank you call from CEO.
- 21. Thank you call from a board of directors.
- 22. Thank you call from someone who benefitted from their donation.
- 23. Call to thank and acknowledge them for their number of years of gving or on their final pledge payment.
- 24. Make a "random" phone call to a major donor to describe something wonderful that just happened because of their gift and you couldn't wait to tell them about it.
- 25. Learn the name of their beloved pet(s) and reference it/them in conversation.
- 26. If the donor shares information about beloved children, grandchildren or relatives, ask about them the next time you see them.
- 27. If appropriate, deliver something special to the donor that would be meaningful to them—a wreath for Christmas, a gift for Hanukah, a cornucopia of fruit for Thanksgiving, a favorite plant, etc. Again, only if it will be meaningful.
- 28. If they want to remain anonymous, assure this is done but recognize them privately.
- 29. If they do not want recognition, still thank them in special ways that are meaningful to the donor.
- 30. If they call to vent, listen, be empathetic, and take appropriate action.
- 31. Follow up promptly on their requests. Continue to build their trust.
- 32. Learn why they have given their gifts and ask to use their story to share with prospective donors and possibly in your newsletter or website.
- 33. Send photos of them that are taken at your events in a nice photo card with a personal note, possibly signed by board members and key staff who were there.
- 34. Use first-class stamps on your personal mail.
- 35. Ensure your donor clubs are truly meaningful to your donors. This can turn off a donor easily . . . or incent them to give at a higher level because they love what you have to offer in addition to the cause.
- 36. Recognition, especially publicly, must be done carefully, ensuring the donor knows how they are to be honored and that their name is spelled correctly.
- 37. Send articles or pertinent news about your cause that you know will be meaningful to the donor (i.e. a new robotic surgery machine, a new program developed to reach out to children whose parents are in prison, etc.).
- 38. If they are elderly and no longer live on their own, learn who their caretakers are. The donor will most likely talk about them and it will be an endearing connection (if appropriate).
- 39. Ask your donor if they would like to bring a friend or family member to tour your facility or see a particular cause in action.
- 40. If they have outstanding pledges, keep them informed of new opportunities that arise. They may love the new cause and want to give additional gifts.
- 41. If your donor passes away, attend their service and send a personal note to the family sharing what they meant to your organization and to you.

- 42. Create a special memento of the specific cause that is important to your donor and give it to them. Shutterfly and Snapfish are great sources to create photo collages with stories for these special, fairly inexpensive gifts of appreciation that make a great impression.
- 43. Give a hug or endearing handshake when you see your donor.
- 44. <u>Hand write</u> a note to your donor, whether it's a thank you note for their recent gift, a "thinking of you" note, a note to follow up on an activity or request, etc. It can be fun and memorable to receive something personal in the mail.
- 45. If they are snowbirds, ask permission to connect with them at their winter address and phone so you can keep in touch.
- 46. If a donor wants to get involved and raise money for your cause, brainstorm with them on the best ways to make this happen and help them to be successful. You will create a stronger bond and make new connections.
- 47. Attend the fundraiser that your donor invites you to in order to show support and respect for the cause they are involved in.
- 48. Check in on them with a quick phone call after a storm or natural disaster occurs.
- 49. Share mutual love and send a postcard from a place you are visiting to specific major donors. This is an endearing gesture.
- 50. Humble yourself if you are not the right person to steward this donor and find the right person. Sometimes the dynamics are just not there—find someone amongst your staff or volunteers who is the best fit to steward the donor for the donor's sake.

... and many more!

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