Diamonds in the Rough:
Finding The Hidden Gems In Your Donor Database
About Steven »

Chief Engagement Officer, Bloomerang
Co-founder/ED, Launch Cause
Contributor: Fundraising Principles and Practice: Second Edition
Member: Fundraising Effectiveness Project (FEP) Project Work Group, AFP Center for Fundraising Innovation (CFI)

Fun facts:
• 1st job: producing fundraising videos
• prefers tea to coffee
• allergic to rhubarb
• won the David Letterman scholarship
Dear Daddy,

I’m so excited to tell you that on May 5, I’m participating in Heritage Christian School’s Jog-A-Thon. We run to show support for our school and raise funds to help pay for our many programs. Jog-a-thon funds have previously provided many blessings such as the Common’s cafe, a new sound system for the auditorium, playground equipment and our shade.

I’m Wesley, and this Scout with Pack 520. Popcorn is probably my favorite food. I would love to be a good friend and do activities with you. If you can send me a picture, I would appreciate it. My popcorn flavor is ‘awesome’ and I would also be considering your support. Will you please sponsor me?

Wesley

Pack 520

SUPPORT

PHOTOS
https://bloomerang.co/blog/you-know-your-ipod-donors-do-you-know-your-teapot-donors/
$1000 +

$500 - $1000

$100 - $500

$25 - $100

$25 and under annually
• bequests
• major gifts
• reactivation
• a monthly commitment
• a second gift
• a first gift
• further engagement
Our “prospect” list »

• 1st-time donors
• donors who have given for 3-5+ consecutive years
• monthly donors
• volunteers who have not yet donated (including board members, fundraisers)
• donors who complain directly or answer surveys negatively / donors who answer surveys positively
• current / former service recipients
• out-of-town donors, not from P2P or memorial (if you are a local org)
• donors who give you updated contact info (unprompted)
• donors who upgrade
• donors who submit matching gifts from their employer
• adult children (especially daughters) of parents who give surviving relatives of deceased long-time donors
• aging, childless donors
• donors who just had their first child
• contact person at a company that sends volunteers
• employees of a corporate sponsor
• donors who use check, vs credit card
• donors who use American Express, vs Visa/Mastercard
Long-Time Loyals (3-5 Years) (regardless of gift amount) / multiple gifts
Who are the best prospects?

- Length of giving to your organization (5+ years of regular giving)
- Giving to you over a long period of time (Giving may not be year after year - but gifts have been made over a long, extended period of time)
- Frequency of Giving (monthly credit card donors, multiple gifts within a year)
- Is an active volunteer (at one time or now a board member, or a volunteer in some manner)
- The Family has been involved in some way in the organization (best if there is a long-time association)
It’s not rich people! »

...there is **no correlation** between either income or wealth with the likelihood of giving by bequest.

Source: Mal Warwick, quoting Robert F. Sharpe, Jr., around 2005
Who are the best prospects?

It may seem counterintuitive, but actually, those with the greatest net worth are not normally your best or most likely prospects for a bequest.

You need to look for men and women who are long term and consistent donors. This is especially true of those who give four or more times a year, several hundred dollars a year. They are your very best prospects for a bequest. The greatest percentage by far are bequests from men and women who leave estates of $2 million or less.
How to keep donors giving for 5+ years »

• 2011 study
• Survey of 1,200 recent (last 12 months), frequent (more than 2 gifts to cause based charities) donors from over 250 nonprofit organizations
• Donors were given a list of 32 reasons why they might continue giving
• Asked to rank them by order of importance
How to keep donors giving for 5+ years »

1. Donor perceives organization is 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

1st-Time Donors
Donor retention averages »

<table>
<thead>
<tr>
<th></th>
<th>AVERAGE</th>
<th>FIRST-TIME</th>
<th>REPEAT</th>
<th>MONTHLY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>43.4%</td>
<td>20.2%</td>
<td>61%</td>
<td>90+%</td>
</tr>
</tbody>
</table>

Source: Fundraising Effectiveness Project [http://afpfep.org](http://afpfep.org)
Donor retention averages »

New Donor Retention Rate YTD

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>24.3%</td>
</tr>
<tr>
<td>2015</td>
<td>25.1%</td>
</tr>
<tr>
<td>2016</td>
<td>22.5%</td>
</tr>
<tr>
<td>2017</td>
<td>24.4%</td>
</tr>
<tr>
<td>2018</td>
<td>20.2%</td>
</tr>
</tbody>
</table>

Source: Fundraising Effectiveness Project http://afpfep.org

@StevenShattuck
1st-Time Donors »

• thank them profusely
• let them know you know they’re a 1st-time donor
• get to know them
  • invite in for tours
  • send surveys
  • why did they give?
• know what they are going to get from you in the first year
• get a second gift!
August 7, 2015

Mr. Steven Shattuck
3625 N Post Rd Suite L100
Indianapolis, IN 46216

Dear Steven,

We gratefully received your July 23, 2015 donation of $5 and immediately put it to work in pursuit of true education.

You are helping to provide scholarship opportunities for students who would otherwise not be able to experience The Oaks Academy’s classical education, small teacher to student ratio, and numerous field trips. Because of you, our students are given the opportunity to grow into oaks of righteousness.

If we can help to arrange a visit or answer any questions please contact Angie Parks by phone (317.931.3687) or by email (spark@theoaksacademy.org).

With warmest appreciation,

Nathan Hand
Director of Advancement

"They will be called oaks of righteousness, a planting of the Lord for the display of His splendor." Isaiah 61:3 NIV

Contributions to The Oaks Academy, Inc. (EIN 39-7052993) are tax deductible as permitted by law. Unless otherwise noted, no goods or services were received in consideration, in whole or part, for this gift.
welcome
YOUR SUPPORT IS APPRECIATED

Here at The Oaks, relationships come first. We welcome you into our family of donors, partners, volunteers and supporters.

Every day is a great day to visit The Oaks Academy. To see your gift at work through a personal visit or tour, please contact:

advancement@theoaksacademy.org | 317.931.3687
The fast, personal touch »

- first-time donors who get a personal thank you within 48 hours are 4x more likely to give a second gift (McConkey-Johnston International UK)

- a thank-you call from a board member to a newly acquired donor within 24 hours of receiving the gifts will increase their next gift by 39%. (Penelope Burk)

Hi Steven!

I’m Julie Henson, the Community Engagement Director at Coburn Place and I got connected to you through Adam Clevenger and your generous participation in his birthday fundraiser!! Woo! You all really hit it out of the park, and have impacted Coburn Place in a big way. We also use Bloomerang here at Coburn Place and love it, so definitely grateful to you for that! 😊

I wanted to write for two reasons. One, I’d love to get you in for a tour and show you around so you can see firsthand the impact you’re having through participating in Adam’s fundraiser, and through having awesome software that helps us keep track of all the good stuff. And secondly, Adam mentioned that Bloomerang often does volunteer days? We love having corporate groups out to do all sorts of projects, and I’d love to chat and see if that would be something your crew would be interested in doing. We have dates open throughout the year and plenty of versatile projects!

Thanks so much for your time and generosity! I look forward to chatting!

Julie

Julie Henson
Community Engagement Director

604 E. 38th Street
Indianapolis, IN 46205
317.923.5750
317.921.1946 fax
Connect: Facebook | Twitter | Instagram | Blog | Give

Everyone deserves a safe home.™
1st Time Donors - survey questions

• “Why did you first give?”
• “Why are you passionate about (cause)?”
• “What would you like to hear from us?”
• “How did you hear about us?”

• Let them tell their story!
NEW MEMBER SURVEY

Please take a few minutes to complete and return this survey. The information you give us will help us better define the nature of our members environmental concerns, and will help us build a useful picture of our supporters and friends. Thank you for your participation.

Why did you choose us? (Please check the most important factors for you.)

☐ WWF is a leader among conservation groups
☐ WWF has an excellent track record in getting conservation results
☐ I trust WWF to spend my money wisely
☐ WWF is part of a large international organization
☐ WWF is a science-based, non-partisan conservation organization
☐ WWF believes that people and nature can and must co-exist in harmony
☐ Other (please specify)

What is your specific conservation interest/concerns:

☐ Canadian wilderness
☐ Canadian species
☐ Endangered species around the world (e.g. giant pandas, tigers, etc.)
☐ Illegal wildlife trade
☐ Impact of toxic chemicals on wildlife and people
☐ Marine species and their habitats
☐ Tropical forests

How do you participate in conservation?

☐ I make an effort to reduce, re-use and/or recycle
☐ I write letters to persuade government officials to save wildlife and the environment
☐ I visit parks and nature reserves
☐ I enjoy bird watching
☐ I subscribe to nature/outdoor magazines.
☐ I watch nature shows on TV.

A few personal details:

1. Are you ☐ male or ☐ female?
2. What is your birth date?
   Day __ Month __ Year __
3. Do you have access to e-mail and/or the Internet? If so, your address is:

4. Are you a member of or do you regularly support other charitable organizations? If so, how many?

Thank you for taking the time to complete this survey. Please write your name and address here. The information you provide is strictly between you and WWF.

Mr./Mrs./Ms./Miss ____________________________
Address: ____________________________________
City: _______________ Province: _____________ Code: ___________
Daytime Phone: ( ) _______ Home Phone: ( ) _______
WWF Membership #: __________________________

Thank You

WWF World Wildlife Fund Canada
90 Eglinton Avenue East, Suite 504, Toronto, Ontario M4P 2Z7

@StevenShattuck
Sample Timeline for Donor Retention

Stewardship plans should move your donors from the left to the right on the donor engagement continuum.

Unaware → Aware → Interest → Experience → Knowledge → Participation → Ownership & Significant Relationship

First year Sample Donor Retention Communication Plan

<table>
<thead>
<tr>
<th>First Gift</th>
<th>Thank Call</th>
<th>Thank Letter/Note</th>
<th>Report/Updates</th>
<th>Invite</th>
<th>Appeal for 2nd Gift</th>
<th>Thank Letter/Note</th>
<th>Report/Updates</th>
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<td>3 days</td>
<td>1 week</td>
<td>monthly</td>
<td>6 weeks</td>
<td>2.5 - 3 months</td>
<td>1 week</td>
<td>monthly</td>
<td>6 weeks</td>
<td>Monthly Ongoing</td>
</tr>
<tr>
<td>Who</td>
<td>Board</td>
<td>Staff</td>
<td>Staff</td>
<td>Volunteer, Staff, Donor</td>
<td>Staff or Board</td>
<td>Staff or Board</td>
<td>Staff</td>
<td>Staff</td>
<td>Staff</td>
</tr>
<tr>
<td>Format</td>
<td>Call</td>
<td>Mailing</td>
<td>Enews or Newsletter</td>
<td>Mailing OR Call</td>
<td>Email, mail or event</td>
<td>Mailing</td>
<td>Enews or Newsletter</td>
<td>Email or mail</td>
<td>Enews or Newsletter</td>
</tr>
</tbody>
</table>
New Donor Timeline

Getting to Know Your New Donor
Send your donors the welcome pack.

CLICK HERE TO LEARN HOW

Ask
Monthly giving ask and/or 1-3 question survey

★ Bonus Points: Include a soft ask of donors.
★ Bonus Points: Handwritten sticky note

Show Impact
Send donors an annual report.

★ Bonus Points: Make it a gratitude report.

CLICK HERE TO LEARN HOW

Ask
Send donors appeal letter, online campaign

★ Bonus Points: Include an "engagement" report.

CLICK HERE TO LEARN HOW

Gratitude
Send your donors a thank you letter.

★ Bonus Points: Thank you call, handwritten note.

Show Impact
Send your donors the impact report.

CLICK HERE TO LEARN HOW

How Can I Help?
Petition, increase donor engagement

How Are We Doing?
Send a donor supporter survey.

★ Bonus Points: Don't forget to follow up.

CLICK HERE TO LEARN HOW

Gratitude
Send your donors the thank you letter.

Surprise & Delight
Send "The Dave Donor Letter."

CLICK HERE TO LEARN HOW

Surprise & Delight
Send your donors an "engagement" piece.

CLICK HERE TO LEARN HOW
Monthly Donors
Who are the best prospects? »

• Length of giving to your organization (5+ years of regular giving)
• Giving to you over a long period of time (Giving may not be year after year - but gifts have been made over a long, extended period of time)
• Frequency of Giving (monthly credit card donors, multiple gifts within a year)
• Is an active volunteer (at one time or now a board member, or a volunteer in some manner)
• The Family has been involved in some way in the organization (best if there is a long-time association)
Monthly Donors »

- 7x more likely to leave a bequest!
- Typically overlooked because monthly gifts are small
- Retained over a long period of time (consistent givers)
- They believe in you, they trust you
- Don’t just send the same boring 12 receipts!
Thanks for supporting [Link]. Your donations are tax deductible. Please keep this receipt for tax purposes. Federal Tax ID 23-7267972

<table>
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<tr>
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<table>
<thead>
<tr>
<th>Billing Information</th>
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<tbody>
<tr>
<td>Steven Shattuck</td>
<td></td>
</tr>
<tr>
<td>5724 Birtz Road</td>
<td></td>
</tr>
<tr>
<td>Indianapolis, Indiana 46216</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:sashattuck@gmail.com">sashattuck@gmail.com</a></td>
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Total: $10.00 (USD)

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<table>
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<th>Merchant Contact Information</th>
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<tbody>
<tr>
<td>Omaha, NE 68102</td>
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<tr>
<td>US</td>
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</table>
Steven Shattuck,

Welcome to our monthly giving program, and thank you for investing in a world where everyone has clean water!

100% of your recurring $10.00 donation will fund clean water projects every month. Along the way, we’re going to send you updates on where your money goes and who it helps. Get ready for a whole lot of good news!

We also want to continue to improve your experience, so to help us do that, please tell us more about yourself in this quick survey.

GOOD NEWS LIKE...

- stories of women like Helen who feel beautiful because of clean water
- real-time data about water flow from our remote sensors in Ethiopia
- stats to demonstrate water functionality and disease reduction in the communities served

We’re also working to grow The Spring community and would love your help sharing our film.

Thanks again for supporting our work!

@StevenShattuck
Dear Leah and Steven,
My name is Doug Everidge and I am a Board member at Joy's House. I want to thank you for your ongoing support. Because of your generosity, we are able to continue providing exceptional services for our guests and their families as well as caregivers throughout the community. Please know that your gift is making a difference. We truly appreciate you.

Thank you so very much,

Doug

Joy's House
ADULT DAY SERVICE

2028 E. Broad Ripple Avenue | Indianapolis, IN 46220 | (317) 254-0828 | joyshouse.org
Dear Steven, + Lea,

I'm dedicating a few Independence Day stars and stripes to you to say thank you!

Your monthly gift to CICOA makes it possible for our clients to be independent as long as possible. I'm so thankful for the difference you make.

As you're enjoying a festive Fourth of July holiday, remember that CICOA is celebrating you!

Have a happy Fourth of July!

Oriol Bell
President & CEO

Thanks to you both for your ongoing support!

@StevenShattuck
Thank you so much for becoming a monthly donor! You and your family give Outreach the ability to bring hope to homeless youth. I have made a quick 2min video for you to share what your monthly gift does for the mission of Outreach – click here to view

Thank you again, Eric, and I are truly humbled to have your support in the mission of Outreach.

Mike Elliott  |  Director of Development
2416 E. New York St Indianapolis, IN 46201  
Direct: 317-653-1545 Mobile: 317-600-9561

outreachindiana.org
317-951-8886
Thank you Steven!

https://share.vidyard.com/watch/rh6mDE1mnwLkZChs2bPfS
Contact Person at Company Who Sends Volunteers

Volunteers Who Have Not Yet Given
Volunteers are 10x more likely to donate to your charity than non-volunteers!

Volunteers are 10x more likely to donate to your charity than non-volunteers! 


A very special thank you to the Brewers of Indiana Guild for once again choosing Joy’s House as the Philanthropic Partner for Winterfest! We look forward to next year. —with Genevieve Rodgers, Lydia Jana, Marks Ball, Candace Preaton, Melissa Gold, Dan Gaines and Sara Langley.
Too good not to share!

Billy Ratthahao <billy.ratthahao> Fri, May 12, 2017, 3:38 PM
to Everyone

Hi All,

Outreach, Inc. just sent us a personal video thanking us for our volunteer efforts yesterday. Talk about genuine and timely acknowledgement!

Enjoy the 1 minute video!
Thank you Bloomerang

https://bloomerang.co/blog/this-nonprofit-volunteer-acknowledgement-puts-all-others-to-shame/
Out-of-Town/State Donors
(not P2P or Memorial)
<table>
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<tr>
<th>Monthly Giving:</th>
<th>Amount</th>
<th>Donated?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joy's House</td>
<td>$50</td>
<td>x</td>
</tr>
<tr>
<td>WOLA</td>
<td>$5</td>
<td>x</td>
</tr>
<tr>
<td>Girls Inc Indy</td>
<td>$10</td>
<td>x</td>
</tr>
<tr>
<td>Mid India</td>
<td>$35</td>
<td>$35</td>
</tr>
<tr>
<td>WFYI</td>
<td>$5</td>
<td>$5</td>
</tr>
<tr>
<td>Kids Voice</td>
<td>$10</td>
<td>$10</td>
</tr>
<tr>
<td>Moms Demand Action</td>
<td>$11</td>
<td>$11</td>
</tr>
<tr>
<td>charity: water</td>
<td>$10</td>
<td>$10</td>
</tr>
<tr>
<td>Outreach, Inc.</td>
<td>$25</td>
<td>$25</td>
</tr>
<tr>
<td>Exodus Refugee</td>
<td>$25</td>
<td>$25</td>
</tr>
<tr>
<td>Buzzards Bay</td>
<td>$25</td>
<td>$25</td>
</tr>
</tbody>
</table>

**Giving Total:**

$211  $146
Dear Steven,

Thank you for your sustaining monthly gift of $50.00 in support of clean water. We are very grateful that you have chosen to support a brighter future for Buzzards Bay.

Thanks to your gift, together we will continue to clean up pollution and protect the Bay from oil spills. We will also work to monitor water quality to better understand the threats to our Bay, and strive to preserve forests and wetlands that are intimately linked to Buzzards Bay. Your support means we will connect with people both young and old - to create the next generation of Bay stewards who will continue the fight to save Buzzards Bay.

For tax purposes, please accept this email as confirmation that no goods or services were provided in exchange for this gift.

Thank you again for your gift and believing in our shared vision for Buzzards Bay. Together, we will succeed in protecting this beautiful place.

Best regards,
Welcome to the Coalition!

Kim Meneo <meneo@savebuzzardsbay.org>  11/9/17

to me

Mr. Shattuck,

My name is Kim Meneo and I am the development assistant with the Buzzards Bay Coalition. I am reaching out to thank you for your new sustaining membership and to welcome you to the Coalition!

We are very grateful for your support. You will be receiving a new member packet in the mail outlining the benefits of membership as well as information on our recent work. However, if you have any questions or would like to speak further, please do not hesitate to reach me by email or by phone at 508-999-6363 ex. 236.

Again, thank you!

Sincerely,

[bloomerang]
Who are the best prospects? »

• Length of giving to your organization (5+ years of regular giving)
• Giving to you over a long period of time (Giving may not be year after year - but gifts have been made over a long, extended period of time)
• Frequency of Giving (monthly credit card donors, multiple gifts within a year)
• Is an active volunteer (at one time or now a board member, or a volunteer in some manner)
• The Family has been involved in some way in the organization (best if there is a long-time association)
Current/Former Service Recipients
Current / Former Service Recipients »

• they understand the value of your mission
• gives them a sense of pride / empowerment / dignity
• they could have higher capacity some day
• they may higher capacity now (because of you!)
• doesn’t just have to be schools/hospitals
Former Service Recipients »
Aging, Childless
Aging, Childless »

The strongest predictor of likelihood that someone will make a charitable bequest:

childlessness

Source: Russell James III, 2014
Capacity signals »

1. Previous giving to your nonprofit (how much $?)
2. Previous giving to nonprofits like yours (how much $?)
3. Participation as a Foundation Trustee
4. Political Giving
5. Real Estate Ownership

https://bloomerang.co/blog/how-to-use-data-to-identify-your-best-prospective-donors/
Pay attention to »

• donors who give you updated contact info (unprompted)
• donors who upgrade (higher retention rates according to DonorCentrics)
• donors who submit matching gifts from their employer
• monthly donors who give an extra “13th” gift
• adult children (especially daughters) of parents who give
• surviving relatives of deceased long-time donors
• donors who just had their first child
• check > credit card
• American Express > Visa/Mastercard
Final thoughts »

• your best prospects aren’t rich strangers
• segment your list, steward, then wealth screen
• longevity > gift amount
• get to know new donors
• create a 1st-time donor communications plan
• ask current donors how they feel about you
• create standing reports to identify “teapot” donors
Say **goodbye to** spreadsheets, & **hello to** bloomering

**LITE**

$FREE Per Month

0-250 records
Up to $100k in Annual Revenue

**GROW**

$19 Per Month

0-500 records
Up to $250k in Annual Revenue

**GROW**

$59 Per Month

500-750 records
Up to $250k in Annual Revenue

@StevenShattuck
All of our fundraising knowledge at your fingertips!

- Daily blog post
- Weekly webinars
- Downloadables
- Nonprofit Wrap-Up
- Bloomerang TV
- Bloomies

https://bloomerang.co/resources
Questions?

steven.shattuck@bloomerang.co
@StevenShattuck

Slides and free eBooks »

bloomerang.co/resources