

# How to Maximize Donors

## FOR YOUR CAUSE

### Related topics:

- How to attract new donors
- How to turn board members into ambassadors
- How to customize your message



*This worksheet is a complementary guide to help you put into practice the advice found in our “How to Maximize Donors for Your Cause” video. Each 3-minute video is packed with information and is designed to be watched multiple times—even while you are completing this worksheet.*

**WHAT** Create a plan to systematically increase engagement and support from donors.

**TIME REQUIRED** 8 hours

**WHO IS INVOLVED** We suggest brainstorming responses as a team. Alternatively, you can start this process alone, and then refine with a larger group.

Fundraising is an essential part of every cause. While each donor relationship is unique, your cause needs an overall strategy to increase opportunities for engagement and deeper donor connections.

This worksheet walks you through three steps that guide you in setting up a process to strengthen donor relationships and increase donations.

1. Define who you are trying to connect with
2. Design a plan that inspires and motivates
3. Share, then ask

Here is a list of what you will have when you complete the steps:



- Donor personas
- Donor retention calendar (Donor Stewardship plan)

→ For more help, contact Cause Communications at [info@CauseComm.org](mailto:info@CauseComm.org) or visit [CauseCommunications.org/tools](https://CauseCommunications.org/tools) to see other Bite-Size Courses.

Made possible through the support of the Annenberg Foundation, the Ahmanson Foundation, Dwight Stuart Youth Fund, and the Joseph Drown Foundation.



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### 1. Define who you are trying to connect with:

*A. Knowing more about who you are talking to allows you to be more personal and relevant in your communications. Defining your donor audiences also allows you to prioritize and focus on the prospects with the greatest potential. Spend 30 minutes reviewing your current database to create or refine donor segments. Categorize donors by previous giving amounts, activity, or involvement with the cause and source of contribution (e.g., online, direct mail, etc.).*

*B. Create personas for your top five segments, filling in accurate profiles of each donor group. Use the “How to Identify Audiences” worksheet to help you with the persona creation process.*



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### 2. Design a plan that inspires and motivates:

*A clear, consistent message that conveys your impact and emotionally connects donors to your cause can encourage an increase in levels of giving. Create a calendar of outreach customized to each donor segment that will help ensure consistent communications. Consider the progression of actions you want this donor type to take. Some activities will be appropriate for all donors, others may be specific to donor levels or those with particular giving preferences. Look at your cause's event calendar to help drive your specific plans. Maximize those events or outreach activities to better communicate the impact your donors' gifts will have on those you serve.*

#### Donor Segment 1:

Timing	Outreach Activity	Desired Action/Involvement



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### 3. Share, then ask:

A. *Studies show that donors would give more if they had a clear understanding of how the funds already donated were spent. Explaining the results of your work as well as sharing what your cause is up to is essential to retaining donors. Build up a collection of stories into a Story Bank that can be used in your outreach efforts. A Story Bank provides a standardized format that makes capturing stories faster and easier and can encourage other staff members to contribute. It may take a bit of time and energy to collect a core group of stories, but once you do they can be quickly used and referenced for months and years to come. Use our “How to Tell Your Story” worksheet for guidance on drafting compelling stories for your cause. Check out the Extras section for more on building a nonprofit Story Bank.*

B. *Periodically conduct brief donor surveys to check in on what is working and what isn't so you can be sure to be spending your resources efficiently. Check the “Extras Tips” section for more on conducting donor surveys.*



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→ EXTRA TIPS

A sample stewardship plan and calendar for renewing donors can be found at: <http://bit.ly/StewardshipPlanSample>

Case study on building a story bank

### Donor Retention:

- Ask the Donor—Where Do Donor Surveys Fit in Your Work?
- What Do We Know & What Can We Do about It?
- 2 Proven Ways to Maximize Fundraising Effectiveness (Infographic)

**Thank yous are an essential part of donor retention. Here are a few links to inspire you:**

- 15 Sincere Ways to Say Thank You to Your Donors
- How to Thank Donors Using Social Media
- Charity: Water Sends Personal Youtube Video Thank Yous