

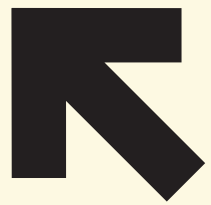
Public Fundraising Symposium

**Getting it Right:
Regulation & Best Practice**

Onboarding & Donor Journeys Building Friends for Life



**Christina Hoey
Fundraising Director
Save the Children NZ**

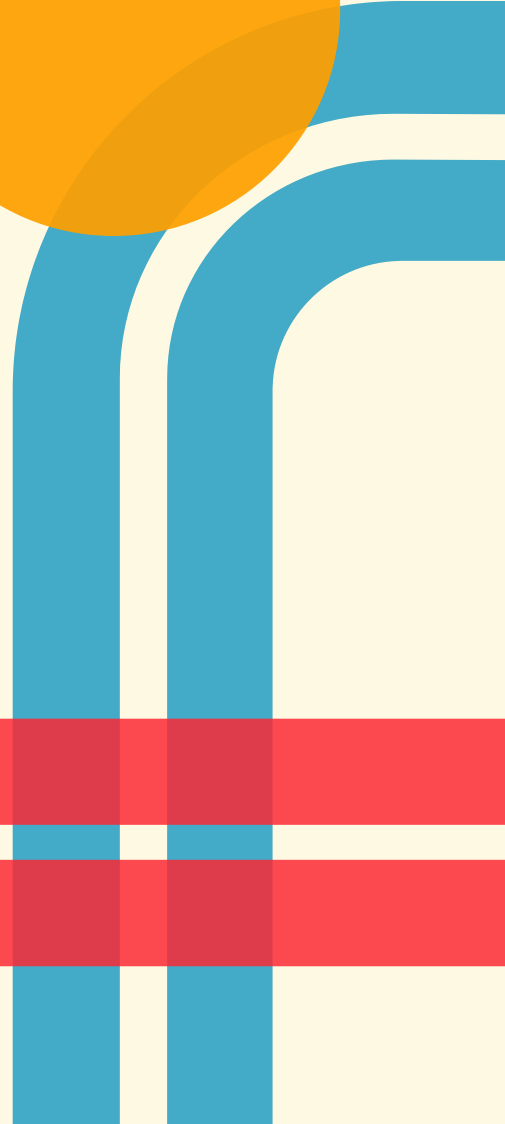


5 things I've learned about Donor Journeys

that sound simple



but are really friggin important





5

things I've learned...

1

**Have the back
end ready
before you
launch**

2

**Meet their
needs, not yours**

3

**Establish the
reason for long-
term giving**

4

**Increase
contactability =
increased value**

5

**The truth
about calling
donors**



1

Have the back end ready

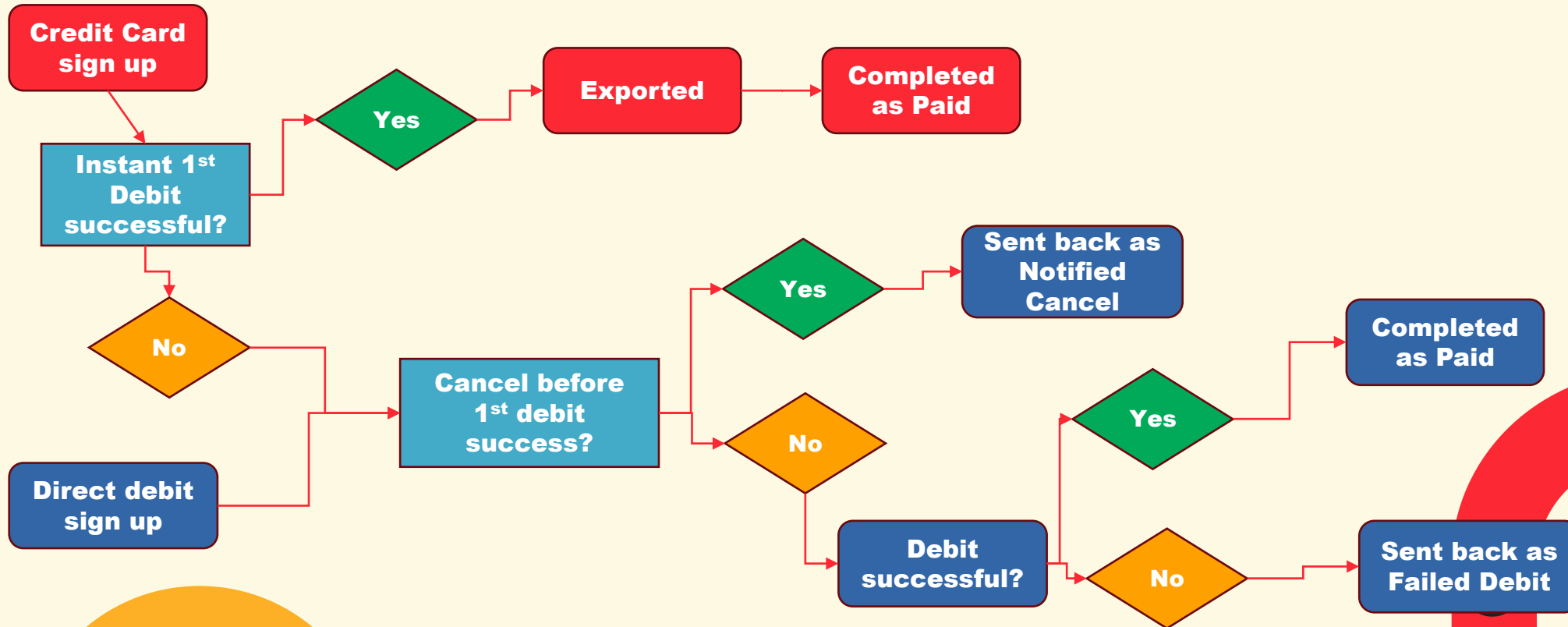
- **Team**
 - **Data wrangler(s) – do they understand your campaign? Objectives? Payment model? Make them your ally!**
 - **Supporter Care – do they understand how the fundraisers will be operating so they can give reassurance? do they know how and when to save a new donor?**
- **Data**
 - **What are the important pieces of information to track? Street vs door vs private site, location, fundraiser, sign up amount, agency, team**
 - **Tracking and reconciling donors you've paid for vs freebies, credits, clawback**
 - **Map the data flows!**





1

Sample data flow





2

Meet your donor's needs

Not the needs of your organisation*

Put yourself in their shoes – what would you need right after you sign up?

- **To be thanked!**
- **Reassurance about the legitimacy**
- **Confirmation of the details**
- **Reinforce the pitch**

***Unless it's a legal thing,
i.e. Terms & Conditions of direct debits**





2

Example: IHC welcome email

- **Personalised!**
- **Thanked!**
- **Details!**
- **Thanked again!**
- **Set up expectations!**
- **T&Cs**



Dear Christina,

Thank you for signing up as a Smile Club member.

Your Monthly regular gift of \$25.00 starting on 1 Aug 2023 will make such a tremendous difference to people living with an intellectual disability in your neighbourhood. Your donations will support them to live, learn, work and enjoy life as part of the community. Thank you so much!

We will contact you again shortly to confirm details of your pledge and to give you your welcome pack. Below are the terms and conditions of your regular gift.



3

Tell them why it's long-term

- **Why monthly giving is better as a donor**
- **What it allows the charity to do**
- **Different proposition to an appeal**
- **Create a product?**



**Breakeven
point**



Example: Fred Hollows

[ABOUT FRED](#)[WHAT WE DO](#)[YOU CAN HELP](#)[LATEST](#)[DONATE](#)[GIVE MONTHLY](#)

WHY GIVING REGULARLY IS BETTER FOR YOU



YOU'LL BE IN CONTROL OF YOUR GIVING

Mindful, intentional and strategic giving allows you to be in control of your giving.

Rather than donating reactively, you can be proud that your gift is considered, planned and intentional.

A regular gift will help fund sight restoring surgeries and education programs, as well as equipment and facility upgrades when needed.

The amount you give each month is your choice and you can easily change it at any time depending on your personal budget and everyday expenses.

WE'LL KEEP IN TOUCH

At The Foundation, our stories are what fuels the fire in our bellies.



4

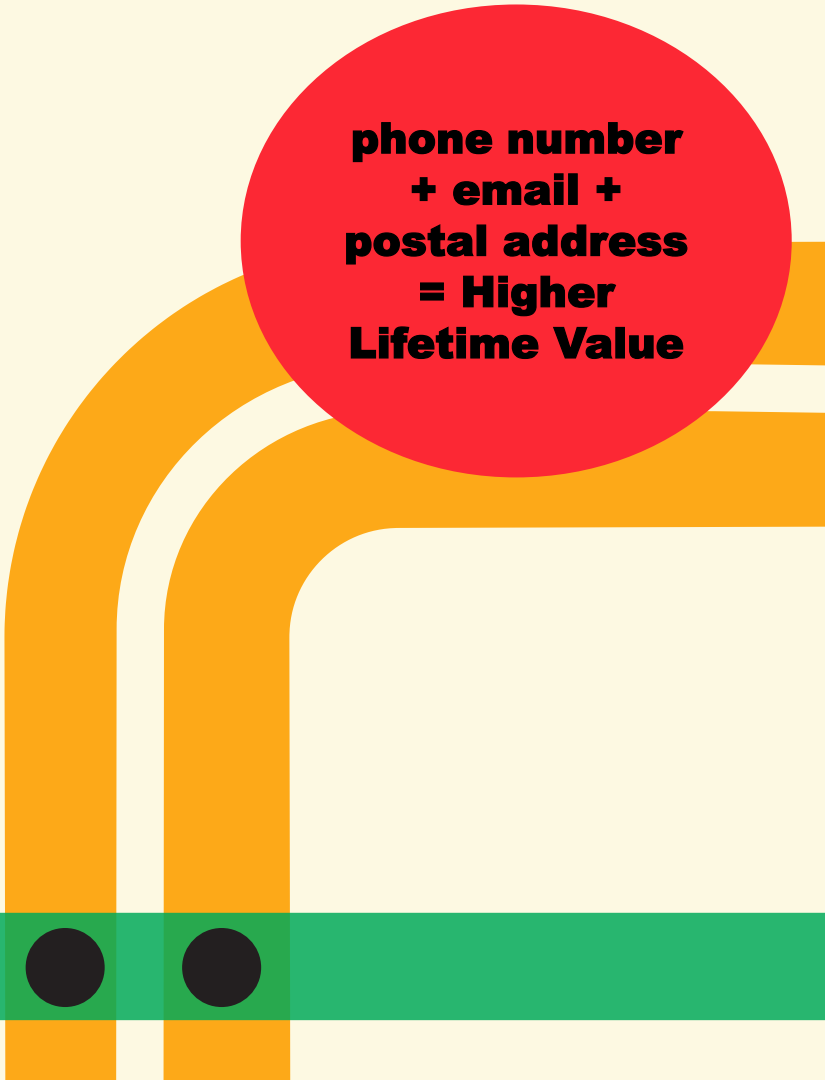
Increase contactability

WHY - Benchmarking tells us that the more contact details you have for a donor, the longer they'll stay

HOW

- **Online donation page – ask for all contact methods**
- **Welcome calling – check if they received email**
- **Supporter care email or phone call – confirm, edit, enhance details on donor records**
- **Survey - part of donor journey**

HURRY – the impact of scams and data breaches



**phone number
+ email +
postal address
= Higher
Lifetime Value**



4

Keep in touch to increase LTV

Delight them with stories of their impact



Ask them to increase their monthly gift



Ask them to come back on board if they've lapsed



Contact them if they miss a donation, get new payment details, ask them for a make up gift

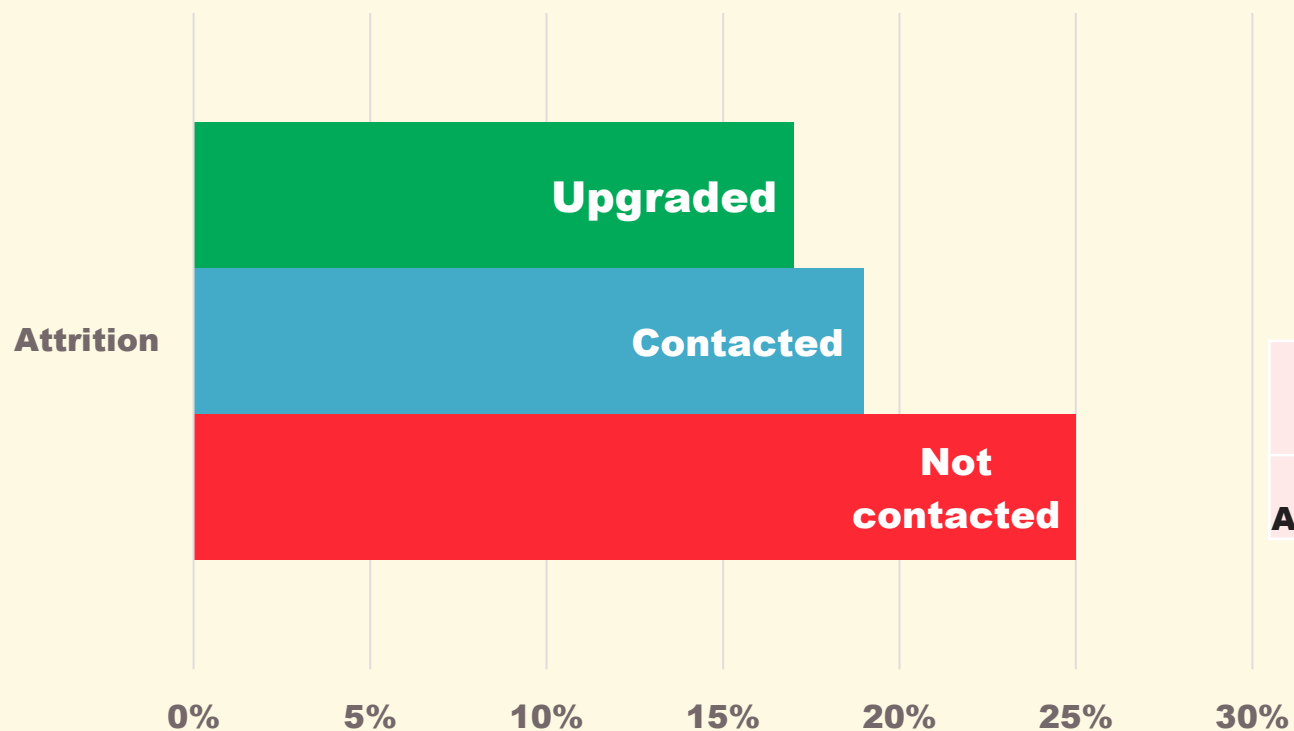




5

The truth about calling donors

Attrition of RGs in Upgrade campaign



	Upgraded	Contacted	Not contacted
Attrition	17%	19%	25%



5

Test test test

**Lapsed RG for 6
Months**

**Reactivation
call**

**27
RGs/month**

**Lapsed RG for 5, 6,
7...80 Months**

**Reactivation
call**

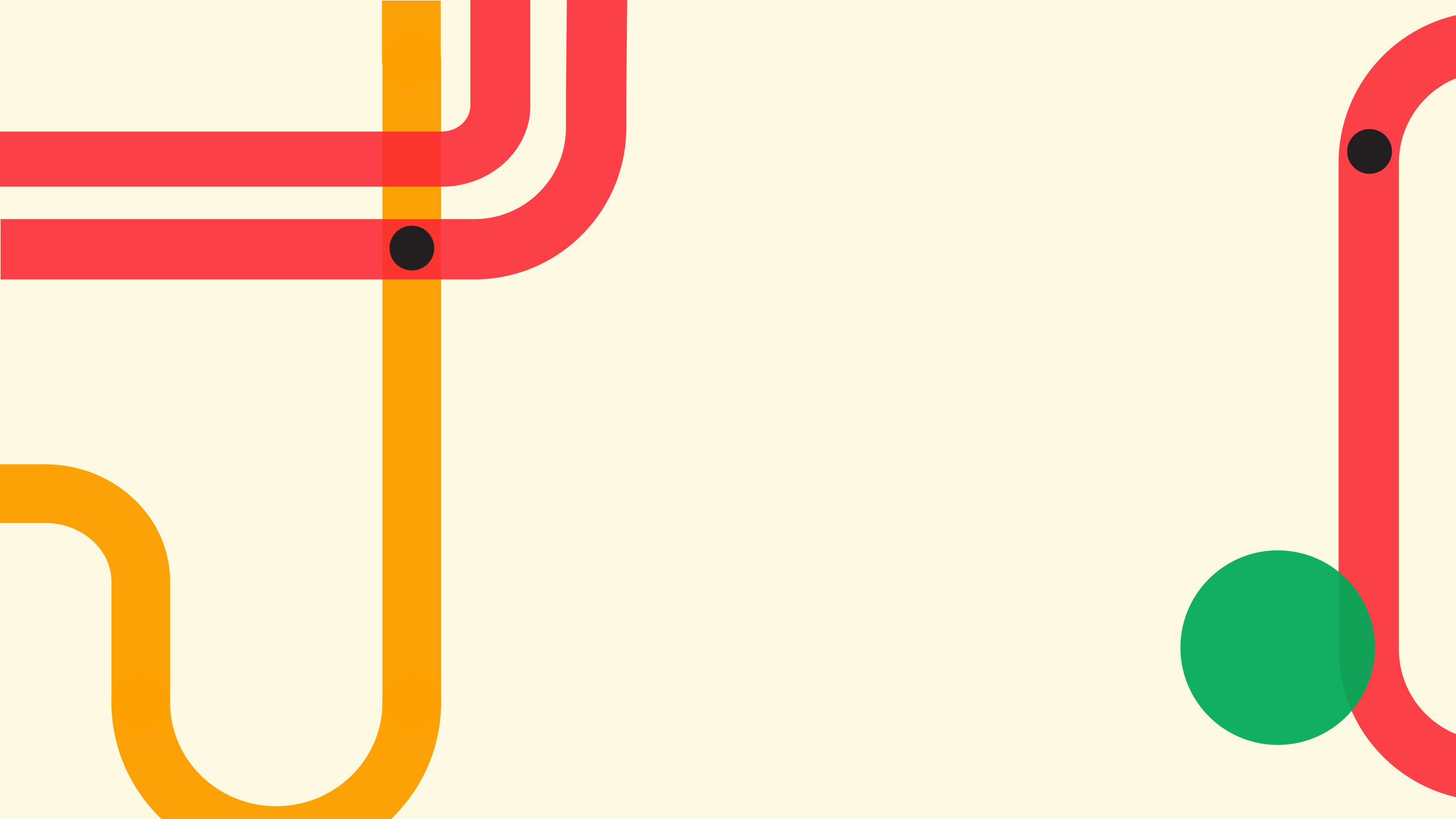
**105
RGs/month**

The background features abstract, thick, rounded lines in red and orange. A red line runs horizontally across the top left, with an orange line running vertically through the center. These lines intersect and curve. A solid green circle is positioned in the bottom right corner. Two small black dots are located on the red lines: one at the intersection of the horizontal and vertical lines, and another further up the vertical line.

Thank you

Christina Hoey

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**What kind of journey are
you taking Regular Giving
donors on?**



**All RG donors begin
a journey with you**



The Short Corner Dairy Trip

The Car Crash

The Weekend Away

The Summer Holiday



Old friends – long journey

“Till Death do us Part”
commitment

Every Journey begins with a Why

What's your organisation's **WHY**?

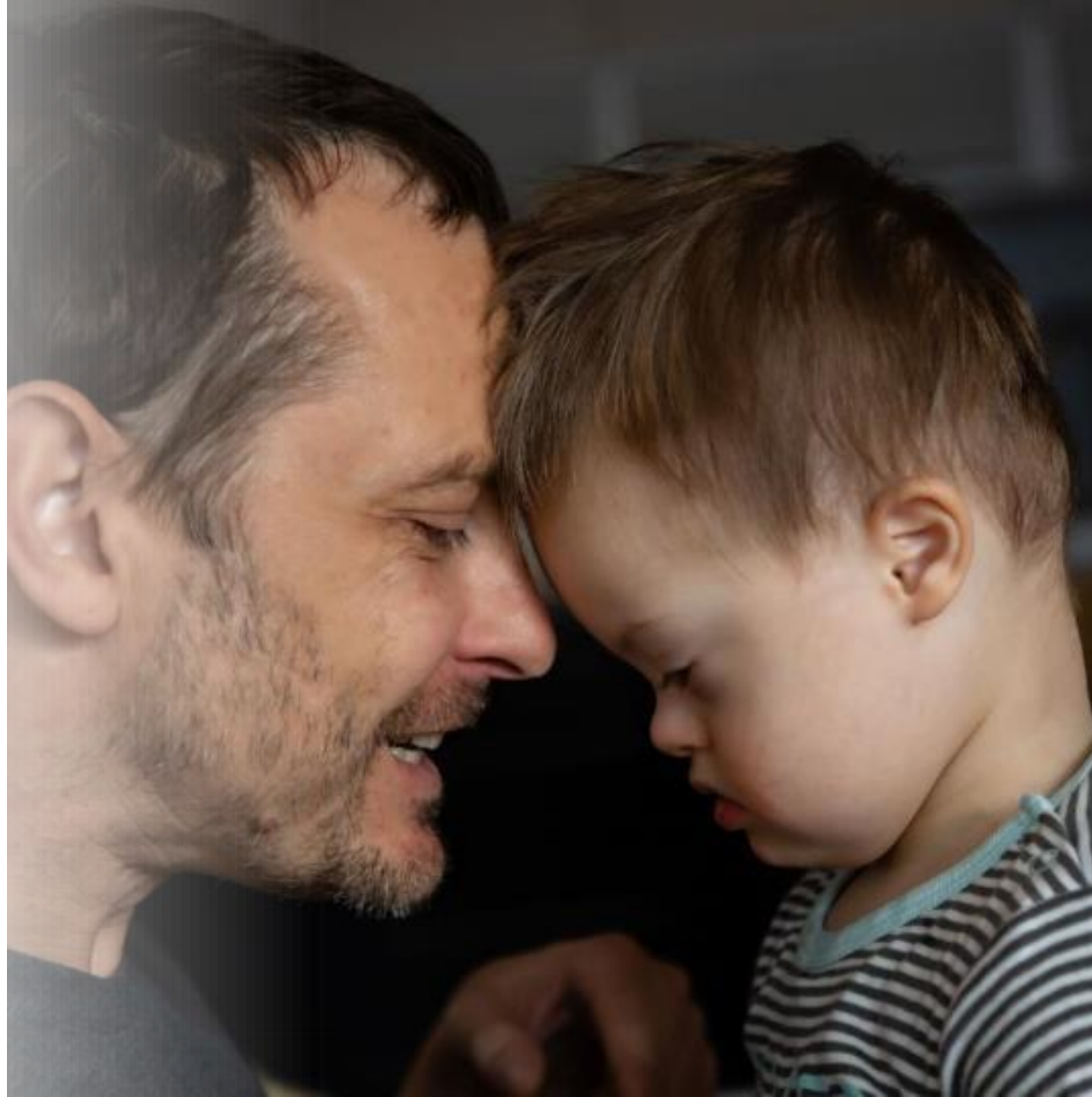
What's the Donor's **WHY**?

What's your **MISSION IMPACT**?

Impact must be **Measurable**



The **WHY** and **MISSION IMPACT** can and must evolve as the organisation begins to realise the possibilities of great fundraising.



IHC's WHY

I have this A4 poster up on the wall beside my desk as an ongoing reminder of my why.

This is IHC's mission and why in the first person singular "I...."

Also, up on the wall beside my desk is IHC's Fundraising 5 Year Growth Strategy on a page.





A Destination



Most journeys have a destination in mind.

Identify what that might be for your organisation – and for the donor. What does it look/feel like?

Imagine it /Describe it /
Write it down

Identify the barriers and how to break through or get around them to get to your destination.

Map out your journey



Important Reminder: This Journey is definitely not all about the destination.

It's making sure there are spectacular moments on the journey, that keep you and the donor going, fuel and inspire you and the donor

Not just a day-trip this is 3 to 20 years

Set your markers / Measure your progress & outcomes along the way



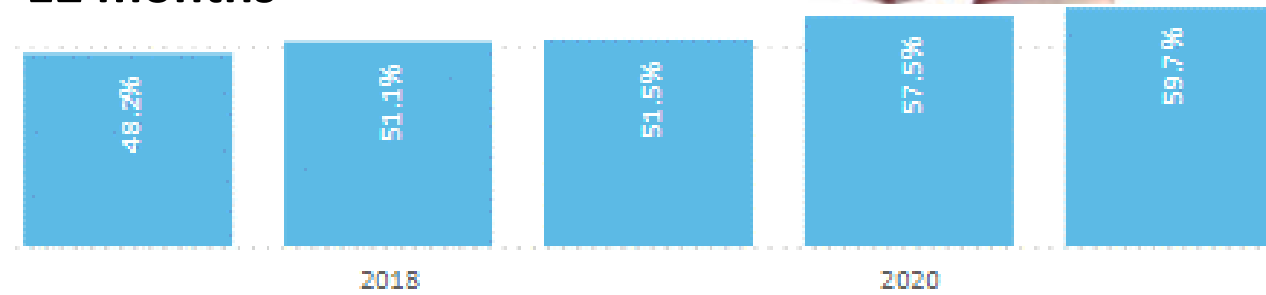
The IHC Donor Journey

1st Focus 0-12 months

- The quality of agencies and fundraisers we work with, the conversations and the donor
- Immediate verification SMS & Email (on sign up)
- Welcome pack mailed / Thank you email video after 1st gift / Thank you email video after 3rd gift.
- The tight processes and procedures Trilby has already described. Great Team – Results Driven.
- CRM change 5 years ago and automation of most processes.
- Telemarketing company change 26 months ago. Both CRM and TM changes were significant and disruptive, but worth it.
- Showing the love – our donor care and responsiveness.

Measurable impact on IHC's donor retention in 1st 12 months

ROI breakeven month improved by 2 months



Telling the Story - & Telling it Well & Simply

- The story is Personal, it's all about the donor – YOUR Impact, YOUR action, YOU'RE part in this story and what YOU make happen In YOUR Community.
- “When times are tough, they're toughest on the most vulnerable – YOU'RE helping some of the most vulnerable people in YOUR community.”
- It's not about statistics or numbers, one powerful story represents many.
- It's not about me, we, IHC, us – it's about the donor and helping that individual donor feel a real part of this story, in and central to the story, a hero in the story.
- The story in the real voice of people with intellectual disabilities and the voice of the Mum or Dad – NOT in IHC speak, not about a client group or service users.

Keep it simple and don't overcommunicate (donors in 1st 4 months of giving excluded from all but tax receipt, as they are on their own welcome journey)

- **Key Suppliers** – Make sure they know the story in its most compelling way, regularly update
- **1st Week of April** – Email Tax Receipt and Your IHC Impact <Salutation>
- **End July** – Email Thank You Impact Update <Salutation>
- **1st Week of December** – Christmas Impact Report, thank you card, and letter mailed
- **Personal Donor Portal** – for 5 years of receipts, upgrade & downgrade, local information and stories



“If I'd been born 40 years ago my parents would have been told to put me in an institution.”



“Saryn's diagnosis turned our lives upside down. We want Saryn to live a fulfilled, rich life. With IHC's help we know she can do this.”

Next Steps



- Welcome revamp – emphasize local and community and the fundraiser who they spoke to (our brand difference is local)
- Growing our Donor Portal capabilities and engagement
- 4 weekly debits (provides an extra annual payment)
- Thank you calls – to be made by a paid fundraiser with an intellectual disability
- Use of data propensity modelling
- High Value treatment
- 13-month personal email recognition
- 26-month personal email recognition
- Recognising personal milestones and achievements
- Surprising donors in special and meaningful ways
- F2F RG donors & Gifts In Wills



IHC Fundraising

Engaging with people who care about their community and some of the most vulnerable people in their community, connecting them with the mission of IHC and the positive impact of our work

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