THE CHEMISTRY OF EMPLOYEE DONOR CULTIVATION:

Turning Year-End Fundraising Efforts into Year-Round Donor Engagement
Emily Bernhards, Project Manager, Client Engagement Solutions

Sarah Ford, Marketing Manager

Ruth Owens, Charitable Funds Manager

Lindsay Nichols, Marketing & Communications Vice President

Elaine Schimming-Daley, National Development Specialist, Mothers Against Drunk Driving (MADD)
AGENDA

1. Donor cultivation cycle
2. MADD case study
3. Deep dive into employee donors
4. Workplace giving donor info and reports
5. Q&A
WELCOME!

- Live Tweet with us @AmerCharities #5xdonations
- We will email you a copy of today’s webinar recording and presentation.

During the webinar, type your questions here.
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DONOR CULTIVATION CYCLE OVERVIEW

- Acquisition
- Stewardship
- Cultivation
- Solicitation

#5xdonations
SEGMENT DIFFERENTLY

**Repayer**
- “I give to my alma mater”
- “I support organizations that have had an impact on me or a loved one”

**Casual Giver**
- “I primarily give to well known nonprofits through a payroll deduction at work”
- “I donated $1,000 so I could host a table at the event”

**High Impact**
- “I give to the nonprofits that I feel are generating the greatest social good”
- “I support causes that seem overlooked by others”

**Faith Based**
- “We give to our church”
- “We only give to organizations that fit with our religious beliefs”

**See the Difference**
- “I think it’s important to support local charities”
- “I only give to small organizations where I feel I can make a difference”

**Personal Ties**
- “I only give when I am familiar with the people who run an organization”
- “A lot of my giving is in response to friends who ask me to support their causes”

www.hopeconsulting.us/moneyforgood

#5xdonations
Reframe the Giving Conversation

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<thead>
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<th>Attitudes</th>
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<td>Lack of trust in nonprofits and beneficiaries</td>
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http://www.cambercollective.com/moneyforgood/

#5xdonations
RETAIN EMPLOYEE DONORS

Stewardship is all about maintaining and evolving long-term relationships with donors.

www.hopeconsulting.us/moneyforgood
## AGENDA

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<td>Deep dive into employee donors</td>
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<td>4</td>
<td>Workplace giving donor info and reports</td>
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<tr>
<td>5</td>
<td>Q&amp;A</td>
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CASE STUDY

Elaine Shimming-Daley
National Development Specialist
Mothers Against Drunk Driving
National Office

www.madd.org
MADD CASE STUDY

Donor Landscape:

- Shift over time
- Why we should care
MADD CASE STUDY

Nonprofit Sector:
- Economic impact of 501(c)3’s
- Intersection of donor trends and nonprofit realities
MADD CASE STUDY

MADD Donor Engagement:
- FY15 Case Study
- FY16 Strategy and Activation
AGENDA

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EMPLOYEE DONORS = 5X MORE $$

- Workplace giving donors give on average five times more, and because donations are typically deducted from paychecks all year long, they are more sustainable.

- How you communicate to and organize employee donors in your database can make or break future retention and $$ raised.
AUDIENCE POLL

▶ Do you acknowledge/thank your employee donors?

▶ Do you keep employee donors organized/tagged uniquely in your database?
EMPLOYEE PLEDGE DISTRIBUTION

- The Combined Federal Campaign, State and Local campaigns, and the majority of private sector workplace giving campaigns occur in the Fall (September – December).
  - America’s Charities Snapshot Reports show that companies are increasingly looking to expand campaigns to year-round employee giving
  - Download these reports: www.charities.org/trends

- Beginning with the first paycheck in January, following the campaign, employee pledges are deducted by employers via payroll deduction.
EMPLOYEE PLEDGE DISTRIBUTION

EXAMPLE FUNDS DISTRIBUTION CYCLE

2015 Campaign

OCTOBER 2015
Employee pledges money to charity xyz

NOVEMBER 2016
Employee chooses to pledge money to charity xyz again this workplace giving season

2016 Campaign

JANUARY 2016
Initial payroll deduction for employee’s Oct 2015 pledge to charity xyz takes place

JANUARY 2017
Initial payroll deduction for employee’s Nov 2016 pledge to charity xyz takes place

MAY 2016
America’s Charities distributes first round of funds from 2015 campaign

MAY 2017
America’s Charities distributes first round of funds from 2016 campaign

APRIL 2017
America’s Charities distributes last round of funds from 2015 campaign

APRIL 2018
America’s Charities distributes last round of funds from 2016 campaign

#5xdonations
EMPLOYEE DONOR INFORMATION

- Employee pledge results are tabulated by the Fiscal Agent appointed by the employer.

- The greatest volume of donor pledge data and contact information first becomes available from workplace giving campaigns between February and June.
  - However donor names may continue to be available throughout the year as campaigns provide reports.
EMPLOYEE DONOR INFORMATION

- The type of donor pledge and contact information made available to nonprofits varies based on what technology platform was used to facilitate employee giving and who an employer has appointed as Fiscal Agent.

- Communicating to employee donors depends on rules/preferences set by each type of campaign - Combined Federal Campaign, State and Local campaign, or Private Sector campaign.
FEDERAL DONORS: C.A.R.E.

What is C.A.R.E.?

An OPM-approved pilot program – ran first for 2014 campaign, again for 2015:

- Provides instantaneous, after-pledge feedback from charities to contributors while protecting the contributor’s anonymity

- Limited to online giving portals (Debit, credit, e-check gifts)

- Feedback has two elements:
  - Thank you message
  - Information on what the charity plans to accomplish with contributor support
FEDERAL DONORS: C.A.R.E.

Why is C.A.R.E. important?

▶ It helps charities contact federal donors who give online.
  ◀ Charities are not allowed to contact federal employees at work, and often, donors either opt out of releasing their personal contact information or accidentally provide their work contact information.

▶ Is in compliance with all CFC regulations and encouraged by the CFC
  ◀ Charities do not have to worry about breaking any federal regulations governing solicitation in the workplace.
FEDERAL DONORS: C.A.R.E.

What are the rules?

- Cannot exceed 1,000 characters in length.
- Cannot solicit additional donations or encourage the donor to give outside of the CFC.
- Cannot ask the donor to provide his/her contact information.
- Cannot ask the donor to contact the charity.
- Cannot include photos, videos, or hyperlinks.
- Should not include your website URL – the CFC automatically includes this anyway
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Reports We Make Available:

1. **Pledge and Donor Report and Donor Acknowledgement Report**
   - All donors who pledged to your organization
   - BUT only personal/contact data for any donor has opted in to provide their information

2. **Distribution Report**
   - Amount to be disbursed to your organization for Private Sector campaigns managed by America’s Charities,
   - includes payment detail for each donor

3. **Member Distribution**
   - Amount to be disbursed to you from CFC, State/Local Campaigns, and Private Sector campaigns where you are featured

4. **Pledge Summary Report**
   - Total amounts pledged to your organization in each campaign

5. **Donor Acknowledgement Report**
   - Only those donors who opted in to receive an acknowledgement/thank you from your organization

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https://www.pledgefirst.org/charitylogin

- Access to your reports, donor data and information
- Enter your assigned user name and password.
- Contact the Help Desk at help@charities.org if need help with your login and password.

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Cookies must be enabled to view reports. To learn more about cookies and to view instructions to adjust your internet settings to enable cookies, please visit Microsoft Internet Explorer or Firefox.

For questions about your report please contact help@charities.org. Please include your user name in all correspondence.
## Example Pledge & Donor Report

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**XYZ County Campaign SUMMARY**

| Amount       | $760.00 |

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**XYZ Company Campaign #1 SUMMARY**

| Amount       | $1,948.00 |

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**ABC Company Campaign #2 SUMMARY**

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**CFC National Capital Area SUMMARY**

| Amount       | $730.00 |

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#5xdaughters
BEST PRACTICES: RECORD-KEEPING

- Download donor pledge reports monthly
- When downloading employee donor data and entering it into your nonprofit’s database:
  - Flag employee donors as “workplace giving donors” so you can customize communications with them differently than your other donors.
  - Mark by campaign type (Combined Federal Campaign/State and Local/Private Sector)
    - This enables you to tailor messaging, including helpful fundraising information like your CFC#
  - Prohibited from selling or lending donor list
  - Do not re-solicit in regular direct mail appeals
BEST PRACTICES: COMMUNICATION

- Employee donors want assurance their gift is reaching the charity and being put to good use. Thank donors as soon as you receive their acknowledgement information.

- Thanking donors is only the first step! Informed donors are your best advocates.

- Put together a communication plan to engage them year-round and to encourage continued giving through the workplace.
SAMPLE EMPLOYEE DONOR COMMUNICATION TIMELINE:

- **During Workplace Giving Campaign**
  America’s Charities provides employee donors with a tax receipt after they complete their pledge, making tax time easy for them

- **February - June (Immediately)**
  Nonprofit sends thank you/acknowledgement letter

- **August - Early September**
  Nonprofit sends reminder letter/postcard – “Thank you for past support. Remember Us in Your Upcoming Workplace Giving Campaign”

- **October – November**
  Nonprofit sends reminder letter #2

- **Year-round**
  Nonprofit uses newsletters, annual report, and other methods to engage employee donors and keep them informed about your impact and goals
THANK YOU LETTER BASICS

When writing employee donation thank you letters, or “acknowledgment letters” as they are sometimes called, remember to include these basic elements:

- Make sure donor remembers/knows HOW they gave to you (i.e. “thank you for supporting charity xyz by donating through employer xyz’s workplace giving campaign)
- Description of services/ impact of gift
- Pledge amount if provided
- CFC # for CFC donors
- Federation Name - Members of Community First, Health First and Children First are listed under America’s Charities in State/Local and most Private campaigns.
- It’s imperative to make the donor feel that he or she is a partner in fulfilling your mission, not just a piggy bank for your organization.
- Keep the message brief and to the point, WITHOUT asking for more funds. Remember that this letter is being sent to say "thank you" ONLY.
AGENDA

1. Donor cultivation cycle
2. MADD case study
3. Deep dive into employee donors
4. Workplace giving donor info and reports
5. Q&A
We will email you a copy of today’s webinar recording and presentation.

Type your questions here.
THANK YOU!

Contact & Connect With Us:
www.charities.org/become-member

Next free webinar: February 9, 2 pm ET
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