

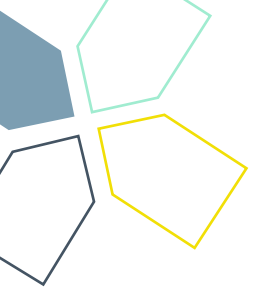


Stewardship – The Next Best Thing

Event

Speakers





More than 20 years of support to organizations!

The BNP difference :

- A rigorous methodology tailored to the project
- Proven results through effective philanthropic and organizational strategies
- Active listening for a collaboration based on human values



Vision

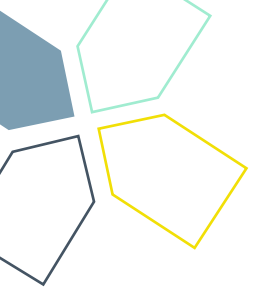
Be the reference in philanthropy and CSR in Canada.



Mission

BNP Philanthropic Performance helps organizations realize their dream of having a positive impact on society.



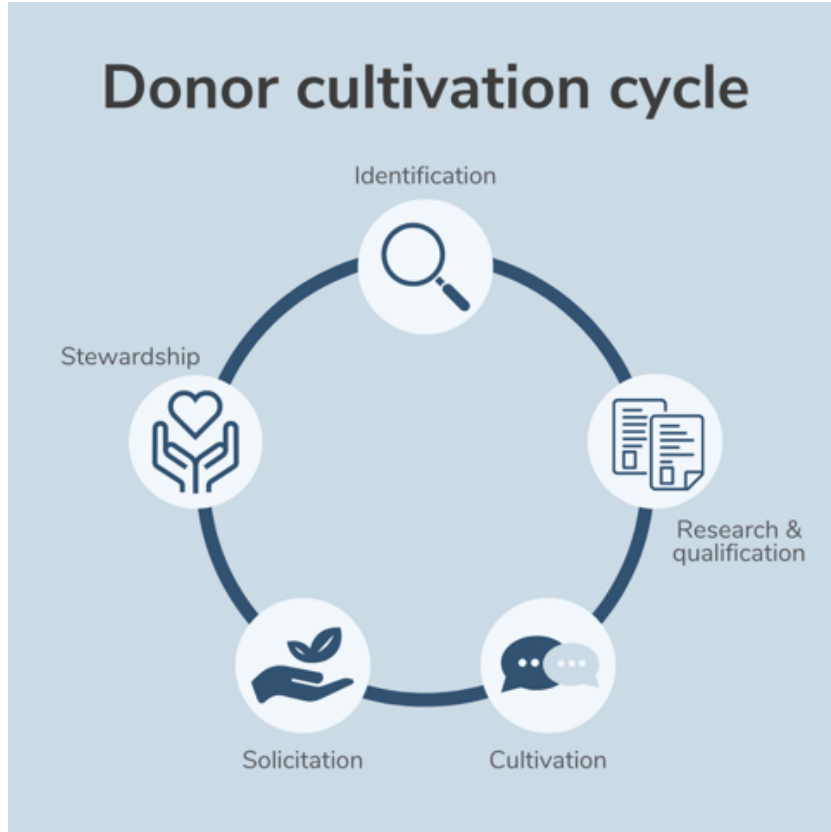


Introduction

- A picture of a very important part of fund development; purposeful and intentional stewardship of donors at all levels
- Stewardship and the impact it has on organizations that practice it
- Understanding the philanthropic landscape and its relationship with stewardship
- COVID and its aftermath
- Conclusions and Recommendations

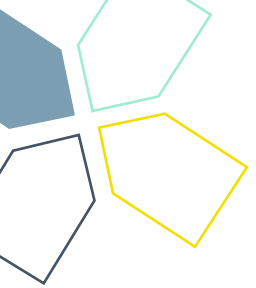


Stewardship: An essential and profitable program



Retaining donors generally costs much less than acquiring new donors. And recurring donors give an average of 42% more than one-time donors. So reducing your number of lost donors (and dollars) is the most efficient and least expensive way to fundraise.

Source: Frewill.com



Methodology

Building on Goldie
Canada Study from
2009

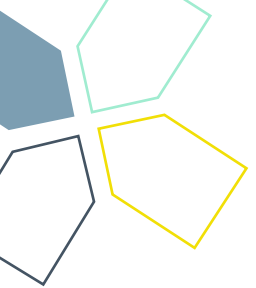
Sent to BNP database

Initial focus on COVID
recovery

82 respondents

All sectors engaged –
healthcare through
religion

Fundraising revenue
from \$50,000 to more
than \$5,000,000



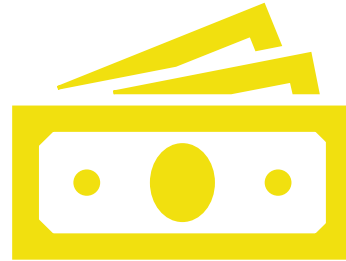
What is Stewardship?



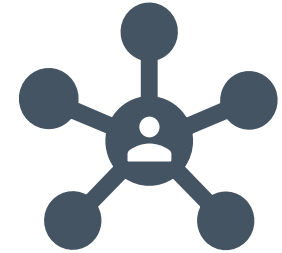
More than thanking
and recognizing



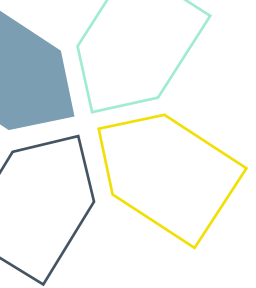
Long-term relationship
= repeat donations



Cost-effective

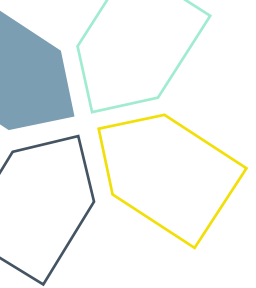


It's about the **donor**, not
about the organization



Our Findings

- 21% of those surveyed do not have a permanent recognition program
- All the organizations thank donors, but most do not contact their donors after this
- Half of the recognition practices are static and do not engage the donor
- The concept of planned, programmed, and formal donor recognition is a relatively underdeveloped practice



Our Findings



PERMANENT OR SPECIFIC RECOGNITION ONLY GET TRIGGERED FOR LARGER DONATIONS



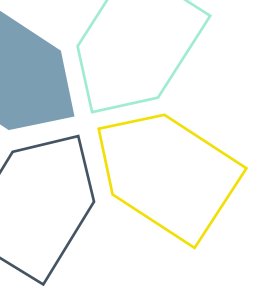
60% OF PROGRAMS FOR DONATIONS OF \$1,000 OR MORE



59% HAVE UPDATED THEIR PROGRAMS IN THE LAST FOUR YEARS



69% **INTEND** TO DEVELOP OR MODIFY THEIR PROGRAMS WITHIN THE YEAR



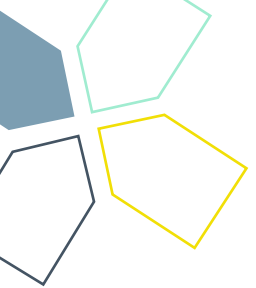
Commonalities

Those with Higher Revenue

- Highest averages touches (11)
- Stewardship program starts at \$1,000
- Best donor retention - majority at 80-100%
- Revised program in last 4 years

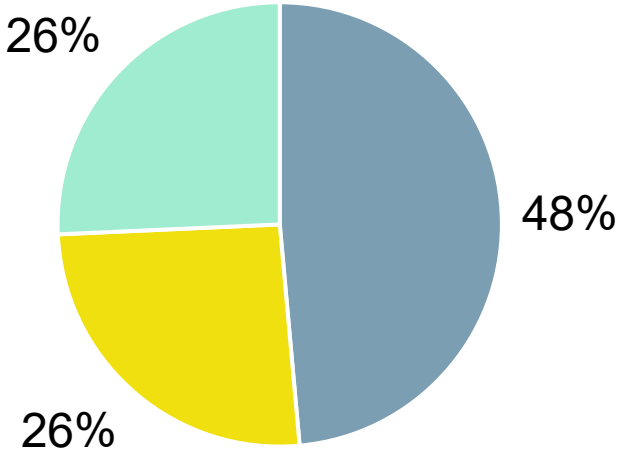
Those with Lower Revenue

- Lower number of touches (7.8)
- Stewardship program starts at \$5,000
- Vast majority had donor retention at <80%
- Stagnant program

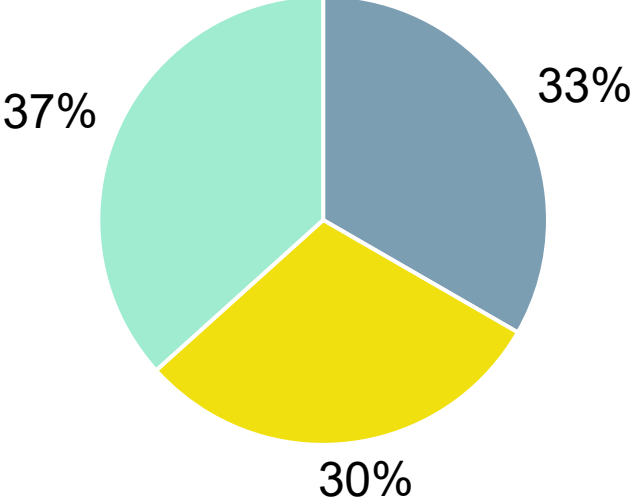


Static vs Modified Stewardship

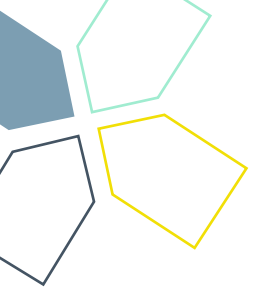
Modified Stewardship



Static Stewardship

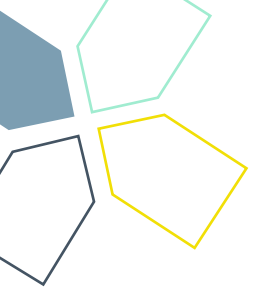


■ Higher Revenue than 2019 ■ Lower Revenue than 2019 ■ Similar revenue to 2019



How Often are Donors Contacted?





Donor Relations

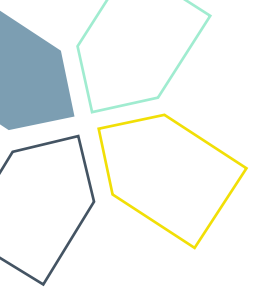
25% contact their major donors twice a year and 28% contact their donors **once** a year.

Approximately 31% contact their major donors 3-5 times a year and 2% every month.

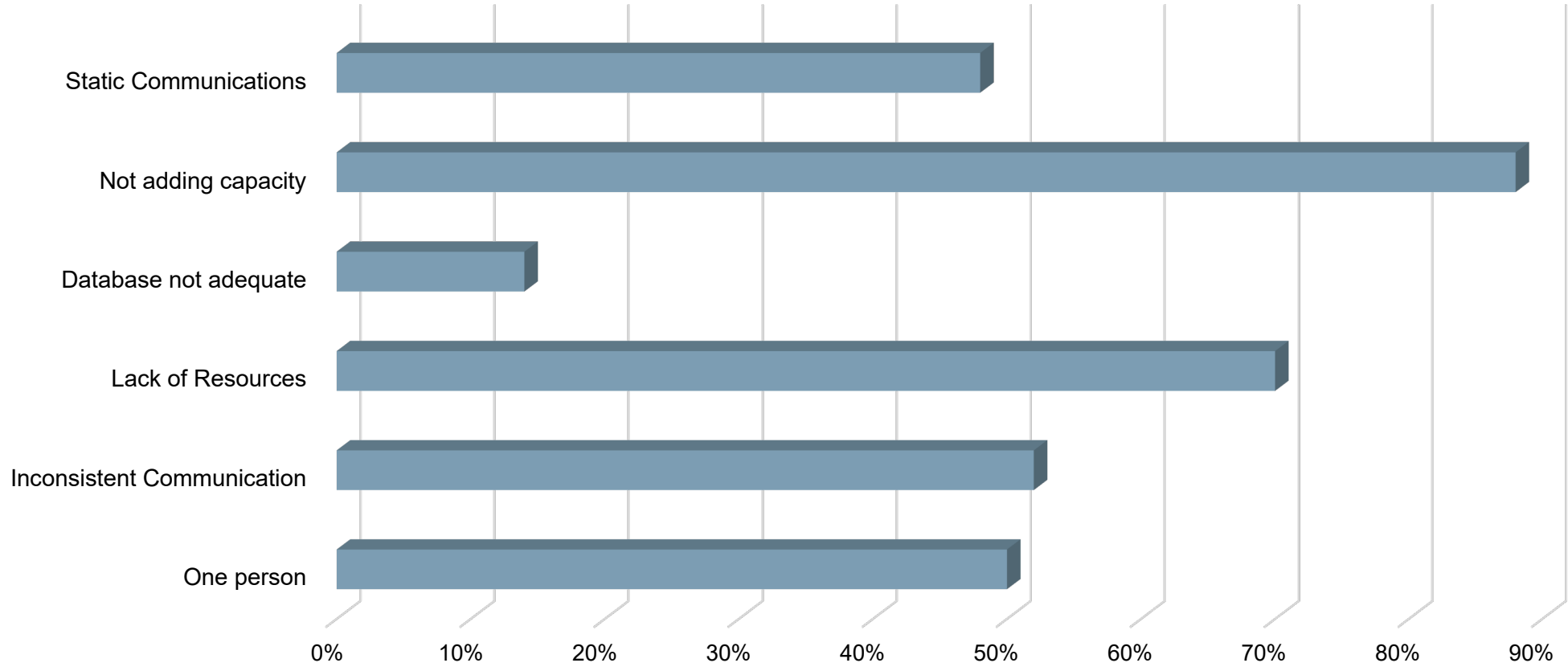
A low percentage of organizations practice true stewardship.

Half said showing impact was most effective.





Challenges to Good Stewardship





Stewardship Programs



Stewardship is a shared activity



50% have one person responsible for stewardship - part-time



Want to improve but 88% are not adding capacity



52% say that communication does not flow consistently



Over 70% state that there is a lack of resources

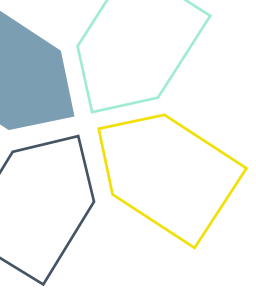


14% say that their databases are not suited to a stewardship program



To be successful, stewardship activities must be tracked to be improved





Top 10 Activities

Showing impact
in writing.

Writing a thank
you letter.

Saying thank
you by phone.

Saying thank
you at an event.

Calling to talk
about impact.

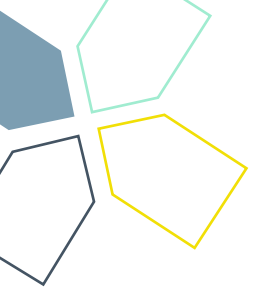
Sending a
newsletter or
report on
donations.

Social Media
Testimonial.

Visits to donors.

Having your
donor visit you.

Having a donor
wall.



Donor Relations



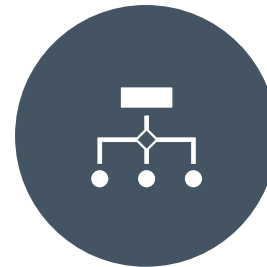
Successful organizations celebrated donors in more than one way



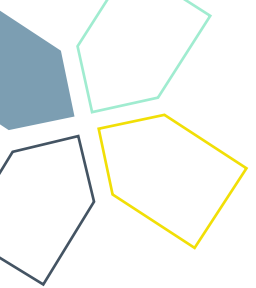
Over 72% modified practices due to pandemic - to virtual!



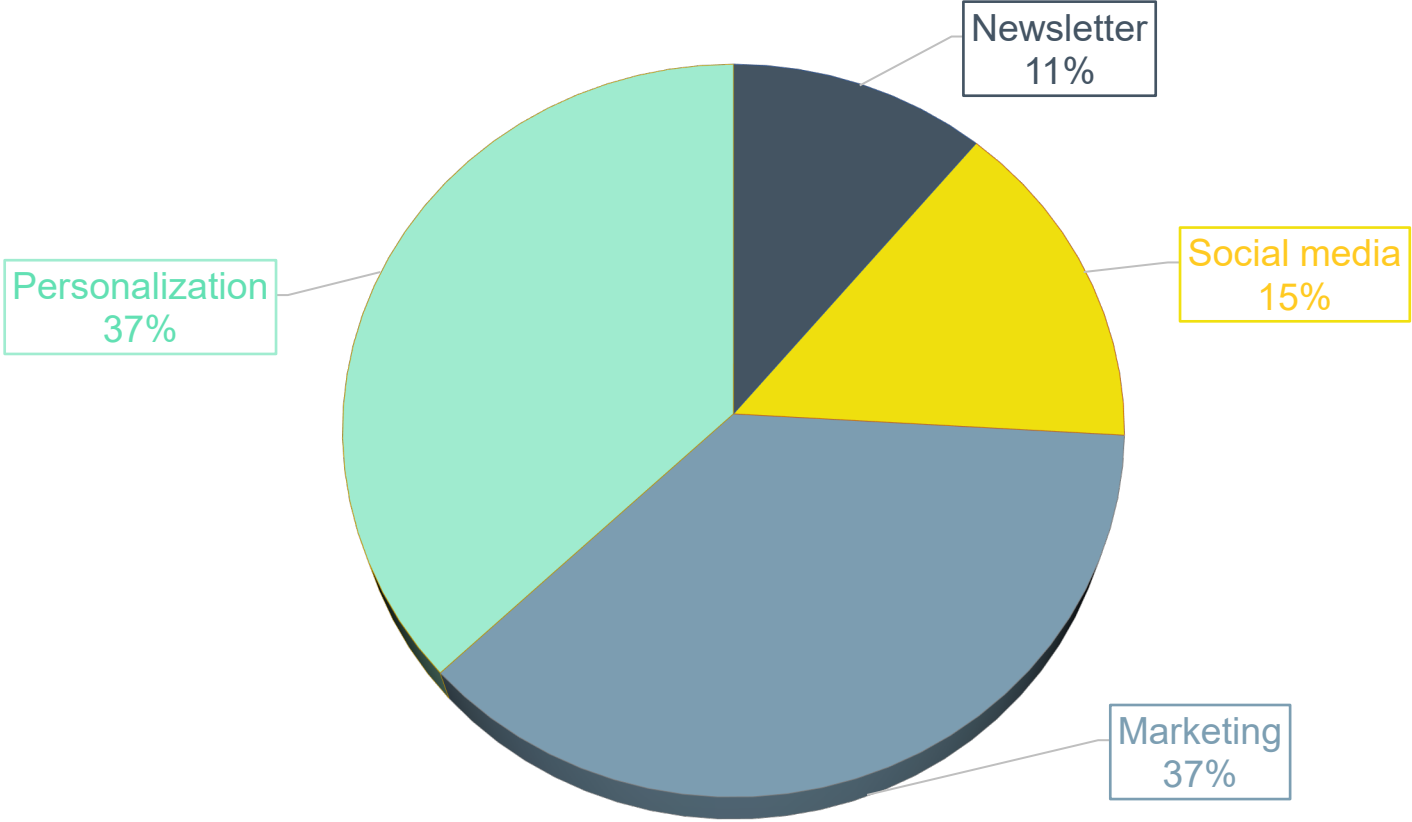
Close to 66% did not modify their practices, 25% suspended their programs

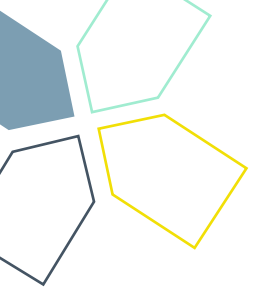


36% have some sort of automated stewardship



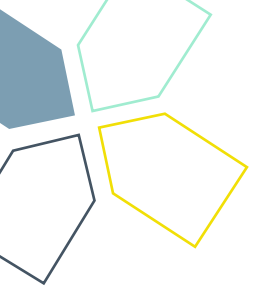
Stewardship Communications





Marketing and Communications

- 48% said they have not changed marketing and communications in the last two years
- Those that did change demonstrated a more proactive approach.
- Social media and increasing professionalism were biggest changes
- New branding and increased fundraising goals were factors



Conclusions



Charities must make stewardship a top priority

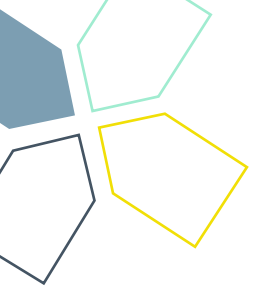


Leaders at all levels must be a part of the plan



Development office must oversee the stewardship plan





Conclusions



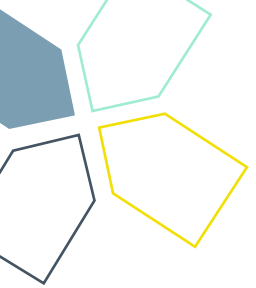
Regular, personal contact should be made with all existing major donors



If possible, face-to-face



Show impact of their generosity in a way that is personal, respectful, informative, and consistent with the mission and vision of the organization



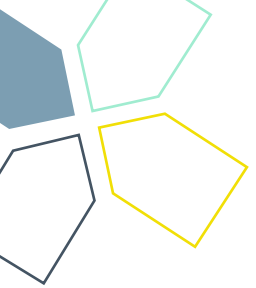
“The best by far, is personal contact and personal reporting on impact of gift, introduction to students who have benefitted from their generosity”

“Thank you phone calls, invitation to visit the organization and meet staff, personalized impact reports.”

QUOTES FROM OUR CHARITY LEADERS!

“I can do more over a cup of coffee than spending a whole lot of money for gala.”

“ We have a new accountability newsletter, ‘Your Donation in Action!’”



Conclusions



Stewardship must integrate with communications, social media and branding



Must fit with the financial and long-term goals of the organization



Individualization is way of the future. Technology enables charities to better understand and communicate with donors the way they want





Conclusions



The bar for a good stewardship program is being raised higher and higher



Those who are not putting stewardship at the forefront will fall behind



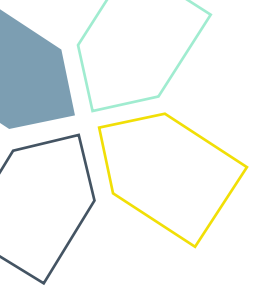
Most major donors are older and well established



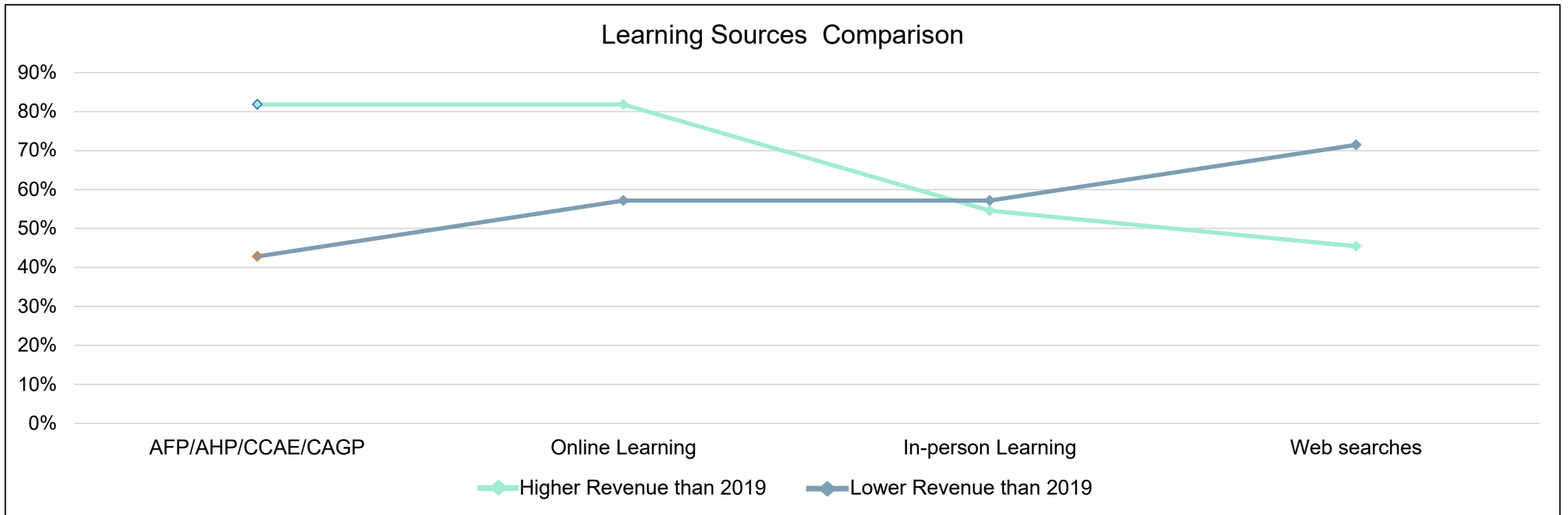
A chat over coffee will do more good than a multitude of tweets, posts or form letters



A hands-on approach to donor stewardship now will lay the groundwork for future success



Getting Advice Helps





QUESTIONS?

1 888 528-8566 – info@bnpperformance.com
bnpperformance.com