



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

# 2017 STRONG COMMUNITIES CAMPAIGN CAMPAIGNER WORKSHOPS

MATT HITCHCOCK  
DIRECTOR OF DEVELOPMENT, YMCA OF SAN FRANCISCO

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# WHAT DOES WHAT YOU DO, DO?

1. What do you **do**?
2. What does **that** do?
3. What does **that** do?
4. What does **that** do?

# HOW DO WE MEASURE SUCCESS?

- **HOW MANY ASKS**
- **NUMBER OF STORIES TOLD?**
- **DONOR RETENTION (NEW/OLD)**
- **MEMBER GIVING**
- **STAFF/BOARD GIVING**

# GROUP ACTIVITY

## Use Activity Worksheet – Sample Assessment

- Step 1: Review and discuss a sample assessment
- Step 2: Identify strengths of the campaign
- Step 3: Identify weaknesses of the campaign
- Step 4: Pick two success indicators to focus on
- Step 5: Why these two success indicators?
- Step 6: Think about your own campaign, what two indicators would you use?

# FUNDRAISING FITNESS TEST

Top Actionable Indicators

## FEP Fundraising Fitness Test

8/26/2015

South Valley

See "All Indicators" worksheet for details and formulas by "Ind. No."

6 <-- Year-end month

### Fundraising Performance Indicators

Year2: 2015

Using Gift Transaction Data By Giving Level/Range

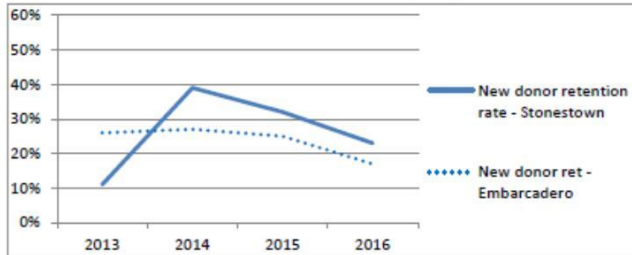
Year1: 2014

Ind No.	Fundraising Performance Indicator	Giving Level/Range					
		All Donors	Under \$100	\$100-\$249	\$250-\$999	\$1,000-\$4,999	\$5,000 & Up
<b>Donor retention rate</b>							
1	New donor retention rate	38%	26%	50%	55%	69%	100%
2	Repeat donor retention rate	58%	46%	57%	71%	82%	67%
3	Overall donor retention rate	49%	35%	54%	67%	80%	75%
<b>Donor acquisition rate</b>							
6a	New donor acquisition rate	37%	40%	40%	33%	13%	13%
6b	Repeat donor re-acquisition rate	10%	8%	12%	9%	10%	13%
6	Overall donor acquisition rate	47%	48%	52%	42%	23%	25%
<b>Donor gains, losses &amp; net</b>							
5	Donor gains	1,019	455	390	149	23	2
7	Donor losses	1101	616	345	118	20	2
9a	Net gain in donors	(82)	(161)	45	31	3	-
12	Net gain in donors (%)	-8%	-35%	12%	21%	13%	0%
<b>Number of donors</b>							
13	Overall donors retained	1,059	330	405	238	80	6
16	Percent of Year2 donors by range	100%	38%	38%	19%	5%	0%
<b>Amount of gifts</b>							
18	Percent of Year2 gift\$ by range	100%	7%	23%	30%	31%	10%
19	Average gift size in Year2	\$ 203	\$ 37	\$ 121	\$ 329	\$ 1,253	\$ 5,197
<b>Dollar gains, losses &amp; net</b>							
20	Dollar gains	\$ 218,200	\$ 17,014	\$ 59,181	\$ 68,149	\$ 56,355	\$ 17,500
22	Dollar losses	\$ 185,163	\$ 23,659	\$ 41,551	\$ 49,672	\$ 33,147	\$ 37,133
27	Net gain in dollars (%)	15%	-39%	30%	27%	41%	-112%
<b>Growth in giving (GiG)</b>							
39	Overall rate of growth in gifts	8%	-19%	23%	17%	22%	-32%
<b>Growth in donors</b>							
43	Overall rate of growth in donors	-4%	-17%	6%	9%	3%	0%
<b>Distribution of Year2 donors &amp; gifts:</b>							
50	Upgraded donors in Year2 %	17%	7%	18%	25%	46%	13%
<b>What Year1 donors did in Year2</b>							
<i>Repeat donors:</i>							
58	Year1 donors that upgraded %	16%	6%	19%	27%	47%	13%
<i>Lapsed donors (attrition):</i>							
66	New Year1 donors that lapsed %	28%	41%	21%	13%	5%	0%
68	Repeat Year1 donors that lapsed %	23%	24%	25%	21%	15%	25%

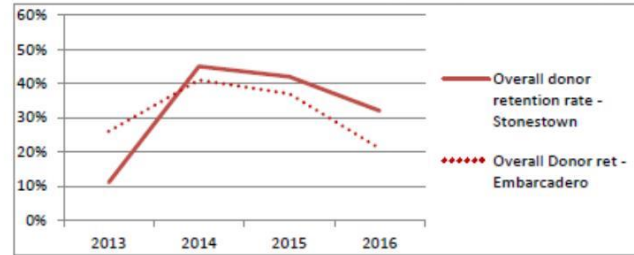
# FUNDRAISING FITNESS TEST

Stonestown Family YMCA

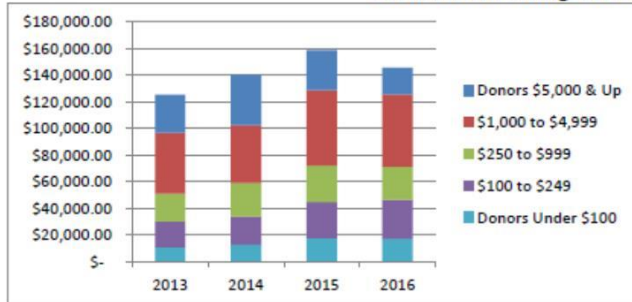
New Donor Retention



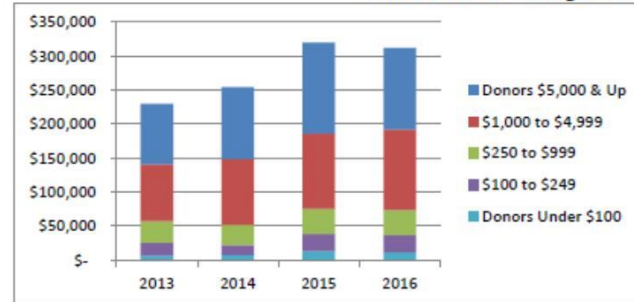
Overall Donor Retention



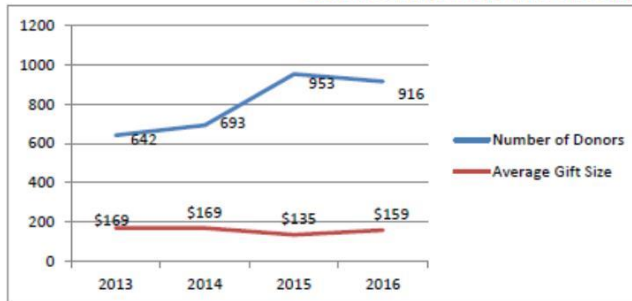
Stonestown Giving Levels



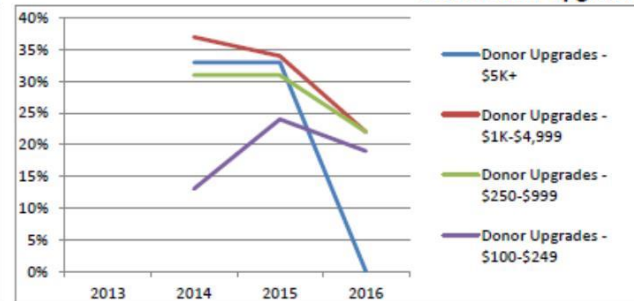
Embarcadero Giving Levels



Stonestown Donors and Gift Size



Stonestown Upgrades



# STEWARDED DONORS



# INSERT Stewardship tracking tool



	January	February	March	April	May	June	July	August	September	October	November	December
<b>Total Combined Annual Giving \$25,000+</b>	Annual Report/Donor Report	VIP Day at Y&G	Y For Youth invite with 1 table		Donor Newsletter	TY call - CEO/ED & DAN	Camp TY postcard & Donor Wall Placement	Summer Program Site Visit	KTC sponsored Invite w/ sponsored 4-some	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>Total Combined Annual Giving \$10,000-\$24,999</b>	Annual Report/Donor Report	VIP Day at Y&G	Y For Youth invite with 1 table		Donor Newsletter	TY call - CEO/ED & DAN	Camp TY postcard & Donor Wall Placement	Summer Program Site Visit	KTC Sponsored Invite	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>Total Combined Annual Giving \$5,000-9,999</b>	Annual Report/Donor Report	VIP Day at Y&G	Y For Youth invite		Donor Newsletter	TY call - CEO/ED & DAN	Camp TY postcard & Donor Wall Placement	Summer Program Site Visit	KTC Sponsored Invite	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>Total Combined Annual Giving \$1,000-4,999</b>	Annual Report/Donor Report	VIP Day at Y&G	Y For Youth invite		Donor Newsletter	TY call - ED & DAN	Camp TY postcard & Donor Wall Placement	Summer Program Site Visit	KTC Invitation	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>Total Combined Annual Giving &lt;\$1,000</b>	Annual Report/Donor Report				Donor Newsletter	TY call - ED & DAN	Donor Wall Placement		KTC Invitation	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>Heritage Club Members</b>	Annual Report/Donor Report				Donor Newsletter	DAN	Camp TY postcard & Donor Wall Placement		KTC Invitation	Donor Newsletter	Thank-a-thon	Hand Signe Holiday
<b>New Donor</b>	Annual Report/Donor Report				Donor Newsletter	DAN	Camp TY postcard & Donor Wall Placement		New Donor Welcome Event	Donor Newsletter	Thank-a-thon	
<b>Donor Communication</b>	Annual Report/Donor Report	VIP Day at Y&G invite Y for Youth Invite	Donor Walls installed	Save the date - DAN	Invite to DAN Donor Newsletter	Invite to Summer program site visit	Camp TY cards Save the date for KTC	Invite for KTC Invite for New Donor Welcome		Donor Newsletter	TY calls from volunteers/staff	Holiday
<b>Bayview</b>	Donor App Dinner			Crab Feed		Bowl for Youth	Primed/Prepped					
<b>Buchanan</b>				Healthy Kids Day						80th Anniversary		
<b>Camp Jones Gulch</b>			Spring Spectacular	Day of Service	Hero's breakfast				Trailblazer Day			Xmas
<b>Central</b>												
<b>Chinatown</b>		New Year Run		Easter Breakfast				Donor App dinner	Golf/Crab feed	Health Fair		
<b>Embarcadero</b>			Swim-a-thon	Healthy Kids Day	YC graduation		Orrick Carnival	Back to School				Winter
<b>Marin</b>	Crab Feed		Splash				Donor App Day Impact Day			Pres Club bfast Impact Day		Bfast v
<b>Mission</b>				Sip/Savor				Golf Tourney				
<b>Peninsula</b>	Cioppino Dinner				Hero's breakfast							
<b>Presidio</b>		Hoop-a-thon	Swim-a-thon Healthy Kids Day	Trail Run		Backyard Campout				Golf tourney Halloween Carnival	Mountain Bike Day	Holiday
<b>Richmond</b>						Comedy Night						
<b>Stonestown</b>							Walk for good			Halloween Dinner	Turkey Ride	
<b>Urban</b>	Reach/Rise Mentor Lunch	Wine Tasting	Egg Hunt Youth Adv Day	Resource Fair				Health Fair			Turkey Give-away	Toy Gi
	PRESENTATION TITLE HERE		©2011 YMCA of the USA					Reach/Rise service Proj			Kwanzaa Event	
								Mobile Produce				
								Family Harvest				

# EACH ONE REACH ONE

Building sustainability for the campaign is paramount to its success for future years.

This year we have a challenge for you....

# IDENTIFYING VOLUNTEERS

- **WHAT ARE THE QUALITIES OF A SUCCESSFUL CAMPAIGNER?**

# OVERCOMING BLOCKS

What are some of the blocks that people have about asking for donations face to face?

I can't ask people for money.....

- Fear of rejection
- No previous experience in asking for a gift
- Don't want to feel obligated
- Self-conscious
- Others?

# MAKING THE ASK

STAFF AND VOLUNTEERS OFTEN WONDER HOW TO PLAN FOR A PERSONAL VISIT WITH AN EXISTING OR POTENTIAL DONOR. HERE IS THE NATURAL FLOW OF A SUCCESSFUL VISIT.

1. **SHARE PURPOSE FOR THE VISIT (BE TRANSPARENT)**
2. **SHARE YOUR COMMITMENT**
3. **SHARE WHY YOU CHOSE THEM**
4. **DISCUSS/QUESTION AND ANSWER**
5. **ASK**
6. **WAIT**
7. **RESPOND TO CONCERNS AND QUESTIONS**
8. **THANK**

# ROLE PLAY!

I'll have a about 5-6 scenarios ready for the groups to split up and try. Possibly with an asker, donor/volunteer prospect, and observer

- Youth Sports Volunteer Coach
- Group Exercise fanatic
- Parent of youth in after school program
- Donor who has given for a number of years
- Noon-time "lapper"
- Senior for the Bingo Club

# WHAT YOU NEED TO KNOW

**LOGISTICS/CAMPAIGN MATERIALS – CARA/MINDY**

**ONLY IF THE CASE/LOGISTICS AND/OR  
MATERIALS HAVE CHANGED SINCE THE PREVIOUS  
YEAR**



# THANK YOU

**Matt Hitchcock**

**YMCA OF SAN FRANCISCO**

**415 281 6766**

**MATT.HITCHCOCK@YMCASF.ORG**

 **@mattdhitchcock**

 **/matt-hitchcock**