

## New member stewardship and renewal program template

Developed by Alice Ferris, GoalBusters Consulting

In general, a donor making a first time gift has a lower possibility of renewing that support than a donor who has given more than once. The goal of this program is to increase the number of contacts with a new donor during the first 12 months after their gift to more quickly build connection with that donor. When this program was in effect at Lowell Observatory, under Alice's tenure as Development Director, the first year donor renewal rate increased from 45% to 55%, boosting the overall renewal rate. (Your results may vary.)

Month	Task	Resources needed
1	<p>You received a gift!</p> <ol style="list-style-type: none"> <li>1. Thank the donor with a customized communication indicating recognition of a first time gift</li> <li>2. Approximately 1-2 weeks later, follow up with a new donor welcome kit, including information about your organization, low cost "swag" such as magnets or stickers, and an invitation to engage more, like signing up for enewsletters or a tour, when possible</li> </ol>	<ul style="list-style-type: none"> <li>• New donor thank you letter</li> <li>• New donor welcome kit</li> </ul>
2	If the person contributed at a level you consider midlevel, follow up with the donor by email, phone or personal note, to thank them again personally. This may be assigned to a staff person or a volunteer.	<ul style="list-style-type: none"> <li>• Phone</li> <li>• Notecards</li> <li>• Computer</li> </ul>
3, 4 & 5	Donor should receive any normal communications such as enewsletters and anything that he or she opted into after the new donor welcome kit	<ul style="list-style-type: none"> <li>• Enewsletters</li> <li>• Newsletters</li> <li>• Other communications</li> </ul>
6	Midyear check in for all new donors: follow up via email, phone or personal note to thank them again for their support and make sure they are getting appropriate communications. (If they opted to receive a donor premium/gift, verify that they received it.) Again, this may be assigned to a staff person or volunteer.	<ul style="list-style-type: none"> <li>• Phone</li> <li>• Notecards</li> <li>• Computer</li> </ul>
7, 8	Donor should receive any normal communications such as enewsletters and anything that he or she opted into after the new donor welcome kit	<ul style="list-style-type: none"> <li>• Enewsletters</li> <li>• Newsletters</li> <li>• Other communications</li> </ul>
9	Soft ask renewal: donor is sent a short, somewhat informal letter thanking them for their support and reminding them that the anniversary of their first gift is coming soon. Enclose an envelope.	<ul style="list-style-type: none"> <li>• New member renewal letter #1</li> </ul>
10	Donor should receive any normal communications such as enewsletters and anything that he or she opted into after the new donor welcome kit	<ul style="list-style-type: none"> <li>• Enewsletters</li> <li>• Newsletters</li> <li>• Other communications</li> </ul>

11	Renewal hit #2: donor is sent a letter, thanking them for their upcoming anniversary of their first gift, and requesting renewal. A modest incentive may be offered here for upgrade, but is not required.	<ul style="list-style-type: none"> <li>• New member renewal letter #2</li> </ul>
12	Renewal hit #3: donor is sent a celebratory themed letter congratulating them on their anniversary of support and asking for renewal. A modest incentive may be offered here for upgrade, but is not required.	<ul style="list-style-type: none"> <li>• New member renewal #3</li> </ul>
13	Donor should receive any normal communications such as newsletters and anything that he or she opted into after the new donor welcome kit	<ul style="list-style-type: none"> <li>• Enewsletters</li> <li>• Newsletters</li> <li>• Other communications</li> </ul>
14	Renewal hit #4: donor is sent a gentle reminder letter asking for support. A modest incentive may be offered to renew support. No upgrade request on this letter.	<ul style="list-style-type: none"> <li>• New member renewal #4</li> </ul>
18	Telemarketing: if you use lapsed telemarketing, donor may go to that list at this time. Script used with first year lapsed donors should be sensitive that they may have just been testing the waters and are not yet committed to the cause.	<ul style="list-style-type: none"> <li>• New member renewal telemarketing</li> </ul>
20	Mark donor as inactive	