



**EVOLUTION**

of

**DONOR  
RECOGNITION**



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Canadian Regional Workshop  
Toronto, April 22, 2016

# SESSION OUTCOMES

- Philanthropic trends affecting recognition
- Evolutionary forces and effects
- Rethinking the donor experience
- Rethinking your recognition strategy
  - Private vs. public recognition
  - Donor engagement
  - Translating organizational vision through recognition
  - Communication with donors

A close-up photograph of a man and a woman in a romantic embrace. The man is on the left, leaning towards the woman on the right. They are nearly kissing, with their faces just inches apart. The woman's hand is gently cupping the man's face. The background is softly blurred, suggesting an outdoor setting.

**From...**

**“You had me at hello”**

**To...**



oh, the  
Places  
We'll

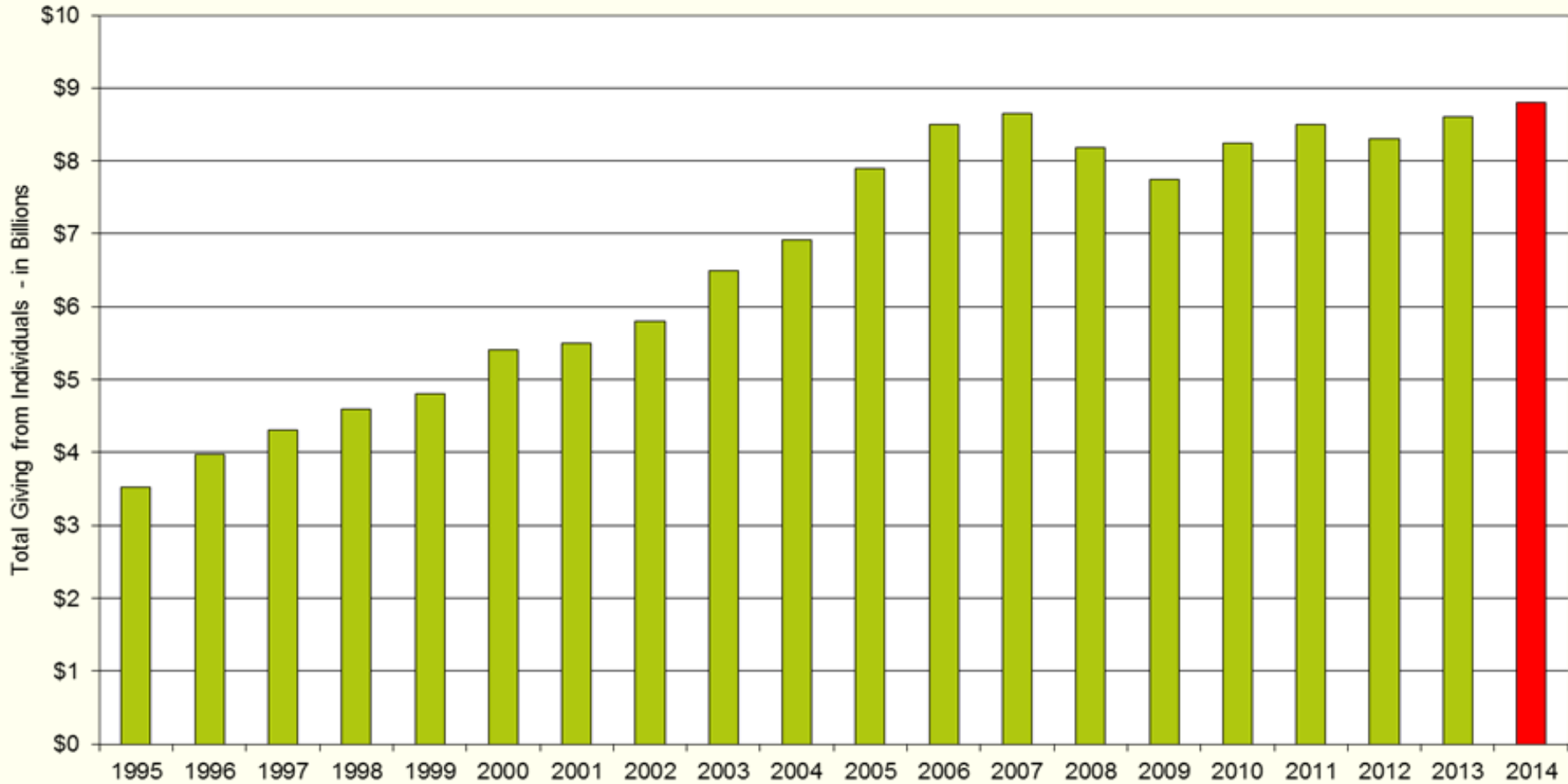
**GO!**

# PHILANTHROPIC LANDSCAPE TRENDS



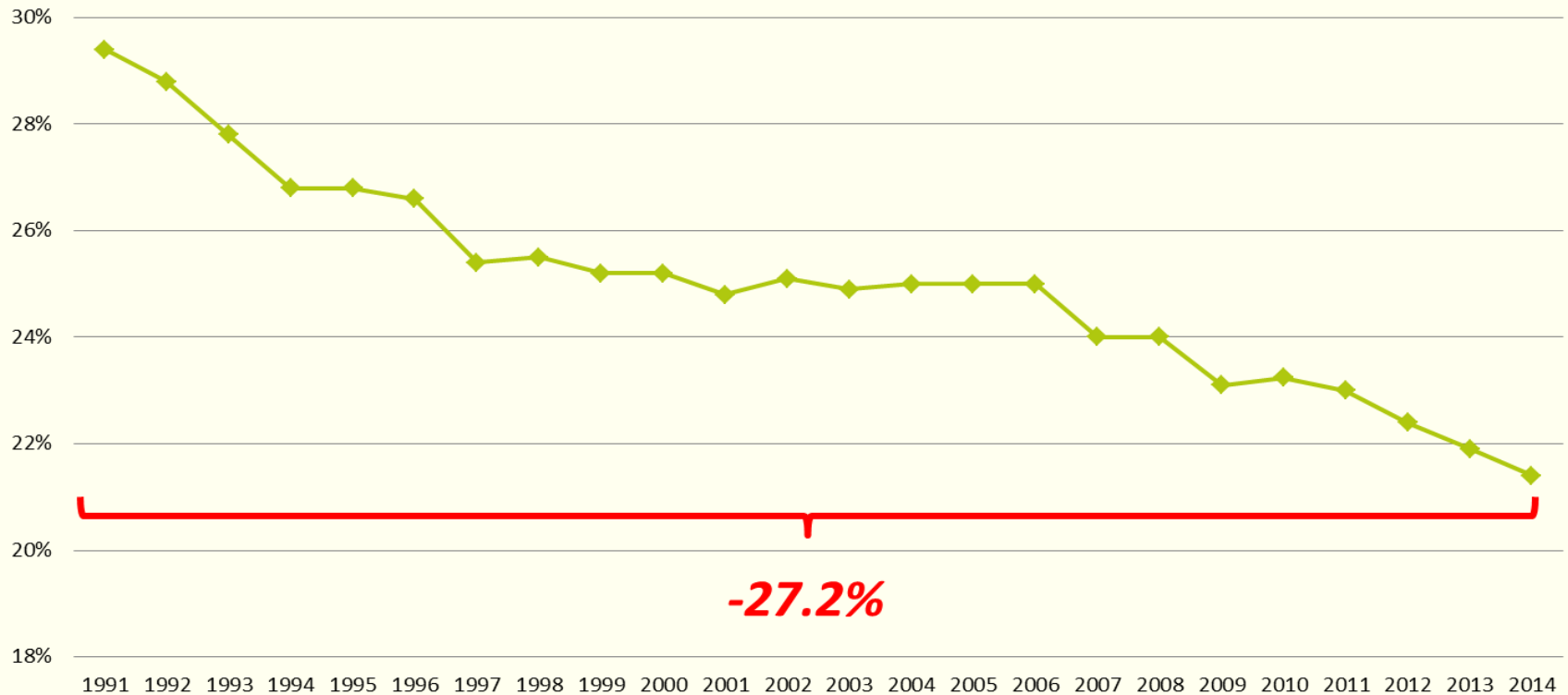
# GIVING IS UNBOUNDED

Charitable Donations Claimed by Canadian Individual Taxfilers (\$ billions)



# BUT... MORE PEOPLE ARE GIVING

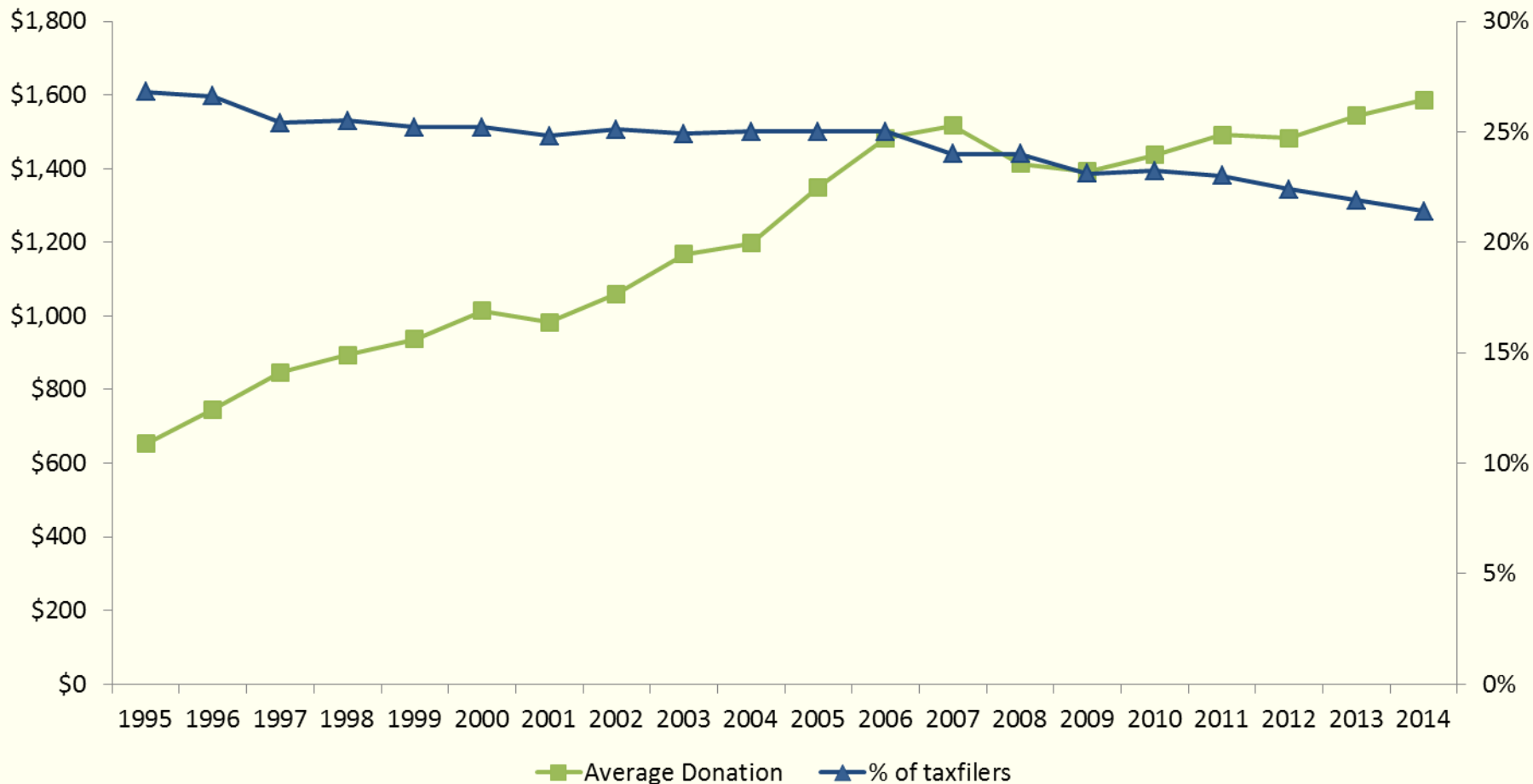
## Percent of Taxfilers Claiming Received Donations



Source: Statistics Canada, Individual Taxfiler Data, CANSIM Table 111-0001

# THE BIG PICTURE

Proportion of Canadian Taxfilers Claiming Donations, and Average Amount Claimed



Source: Statistics Canada, Individual Taxfiler Data, CANSIM Table 111-0001



# HOOSING BECOME THE CHALLENGE

## 2015 BNP PARIBAS INDIVIDUAL PHILANTHROPY INDEX

A WEALTH OF CHOICES: COMPLEXITIES OF TODAY'S PHILANTHROPY

What is the main challenge,  
and thus hard to navigate?

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**#1** Choosing among  
the large number  
of causes **35%**

**#2** Choosing among the large number  
of charitable organizations **30%**

# CLEAR LINE OF SIGHT DESIRED

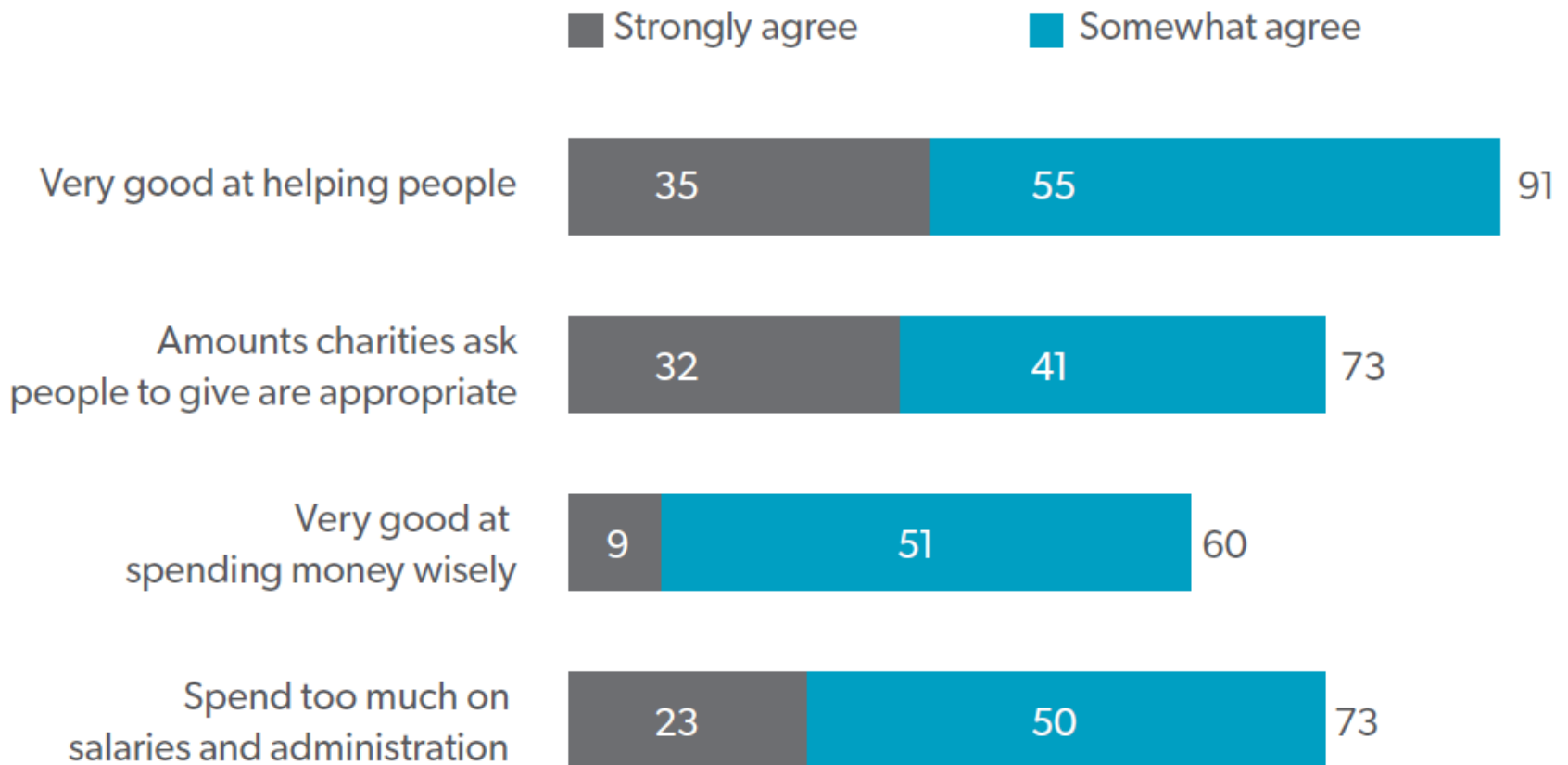
## Aspiring Harvard student crowdfunds more than \$50,000 overnight

Toni Morgan, a formerly homeless Toronto dropout, was helped in her quest for Ivy League tuition fees by hundreds of online donors.



[thestar.com](https://www.thestar.com)

# MANAGING EXPECTATIONS TRICKY



Talking About Charities, 2013

# DAY'S DONORS ARE...

## DELIBERATE

- It's about issues not organizations
- Your organization must be clear on **WHAT YOU ARE** in business to do
- Important to directly link actions and issues

## DISCERNING

- Donors classifying projects in two categories:  
**NICE TO HAVE vs. NEED TO HAVE**
- Your tough questions:
  - Why do we matter?
  - How do we make a difference in society?
  - What difference will this project make?

## DEMANDING

- Bigger fundraising goals = Bigger gifts = More demand for detailed information
- Your case must answer:
  - WHY?
  - WHAT?
  - SO WHAT?

# DAY'S DONORS WANT...



**DAY'S DONORS WANT...**

**Unique  
Donor  
Experience**

# EVOLUTIONARY FORCES



# LAND EFFECTS ON RECOGNITION DONOR RELATIONSHIP MANAGEMENT





# EVOLUTIONARY FORCES

Ongoing need



# EVOLUTIONARY FORCES

**High donor  
expectation  
and knowledge**

# EVOLUTIONARY FORCES

**Increased  
organizational  
exposure,  
competition**

# EVOLUTIONARY FORCES

**Focus on attrition  
and retention**

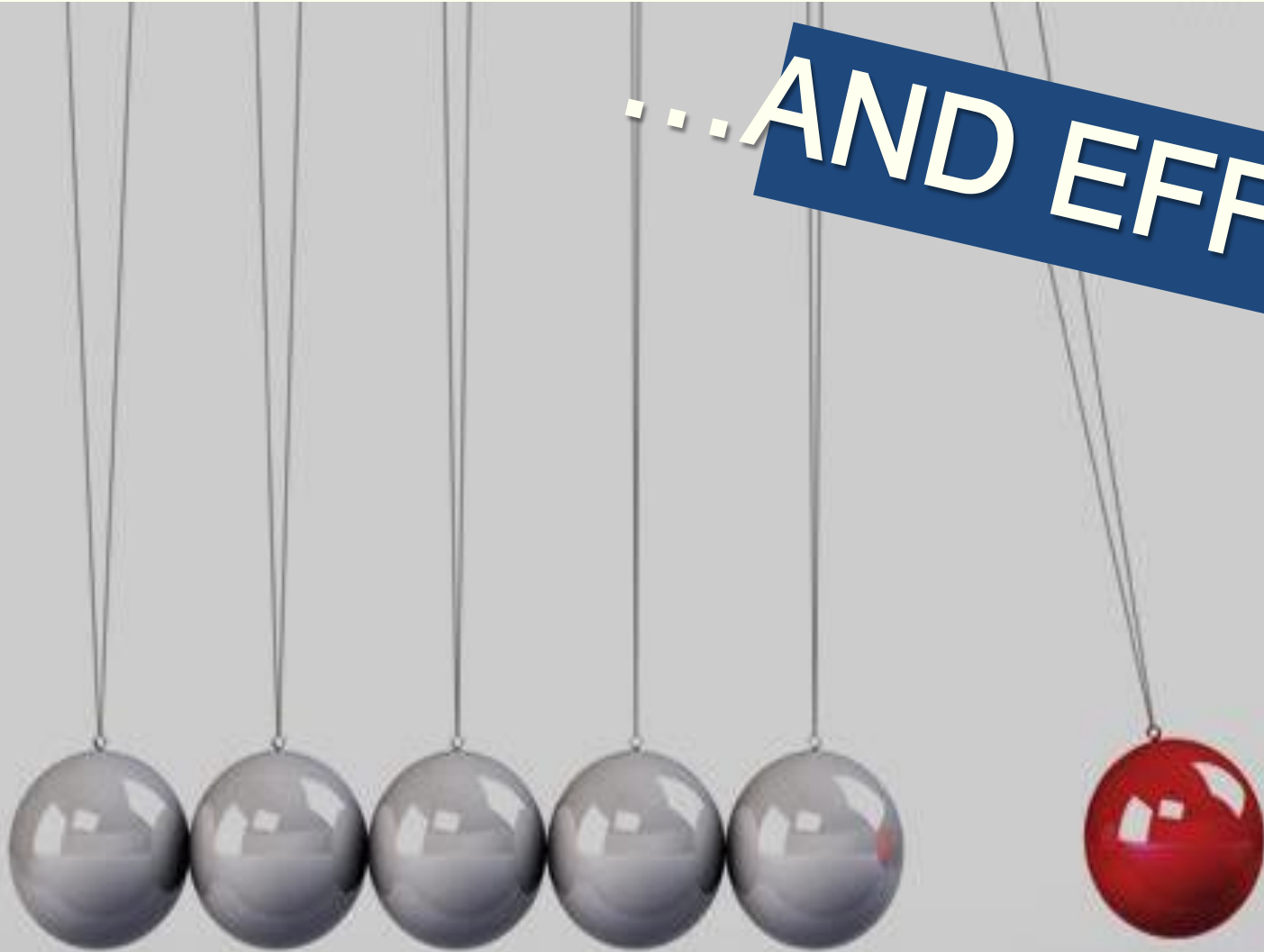


# EVOLUTIONARY FORCES

## Longevity of organizations



...AND EFFECT



...AND EFFECT

Static recognition →  
Two-way dialogue,  
ongoing engagement



...AND EFFECT

# Recognition of lifetime/cumulative giving





...AND EFFECT

**Recognition that  
reflects organizational  
values, culture**

...AND EFFECT

Recognition vehicles  
that are designed to  
evolve as organization  
grows

...AND EFFECT

**Authentic, customized,  
all about donor impact**

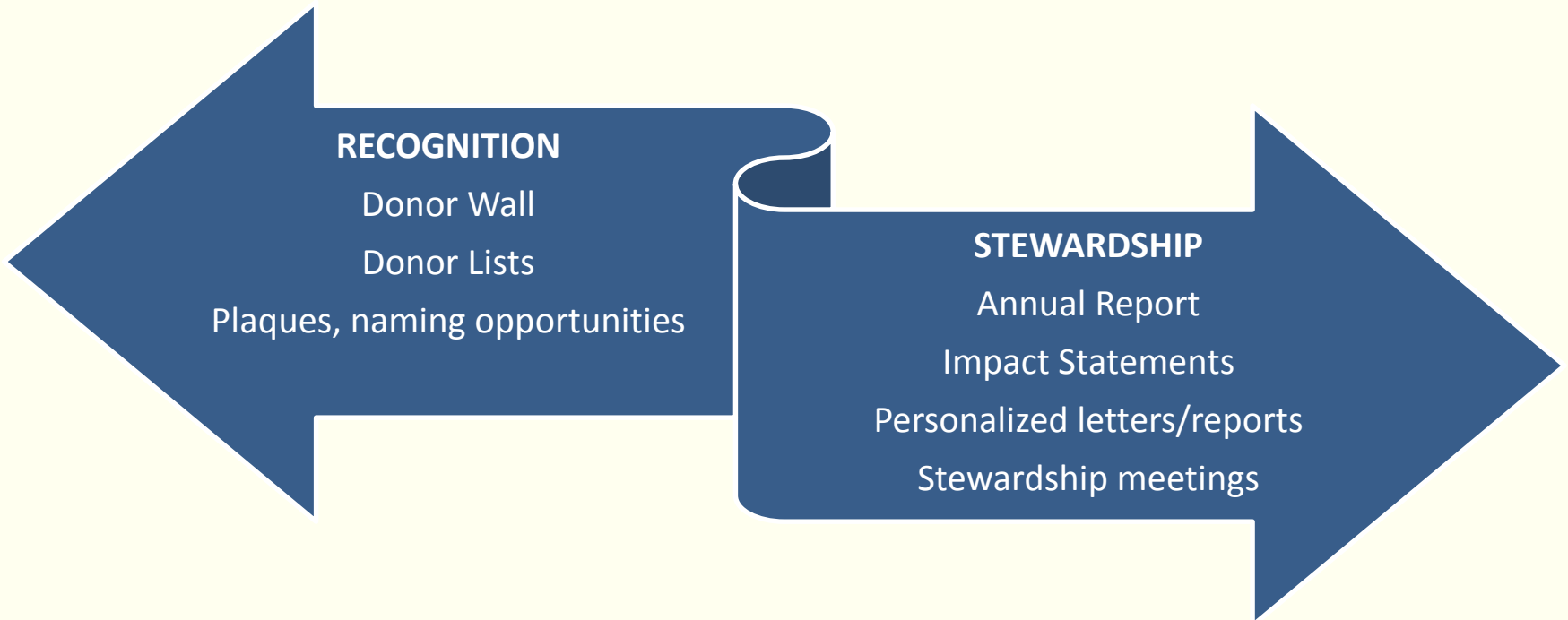


# THINKING THE DONOR EXPERIENCE



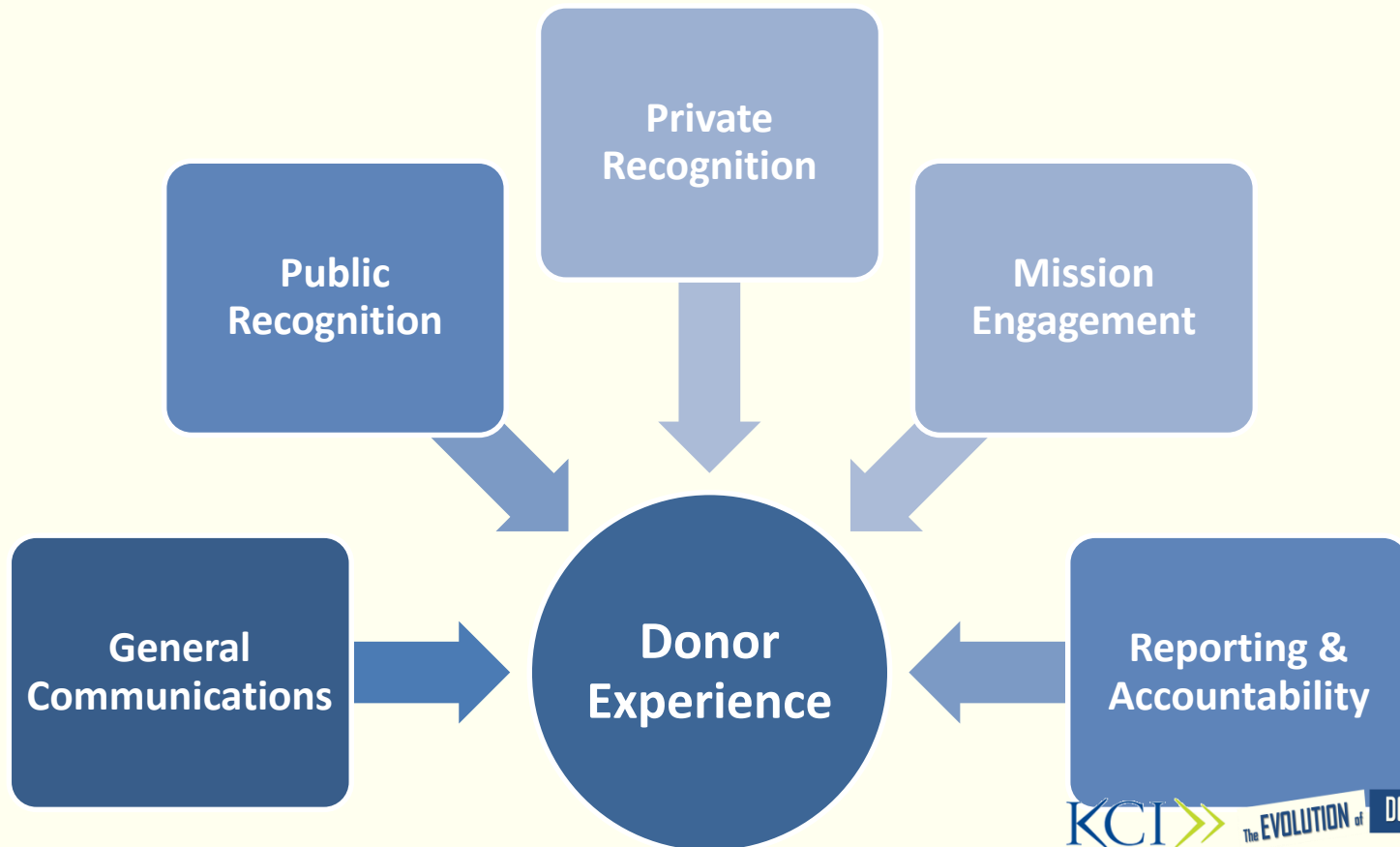
# ETHINKING DONOR EXPERIENCE

## TRADITIONAL MODEL OF DONOR RELATIONS ACTIVITY-CENTRED

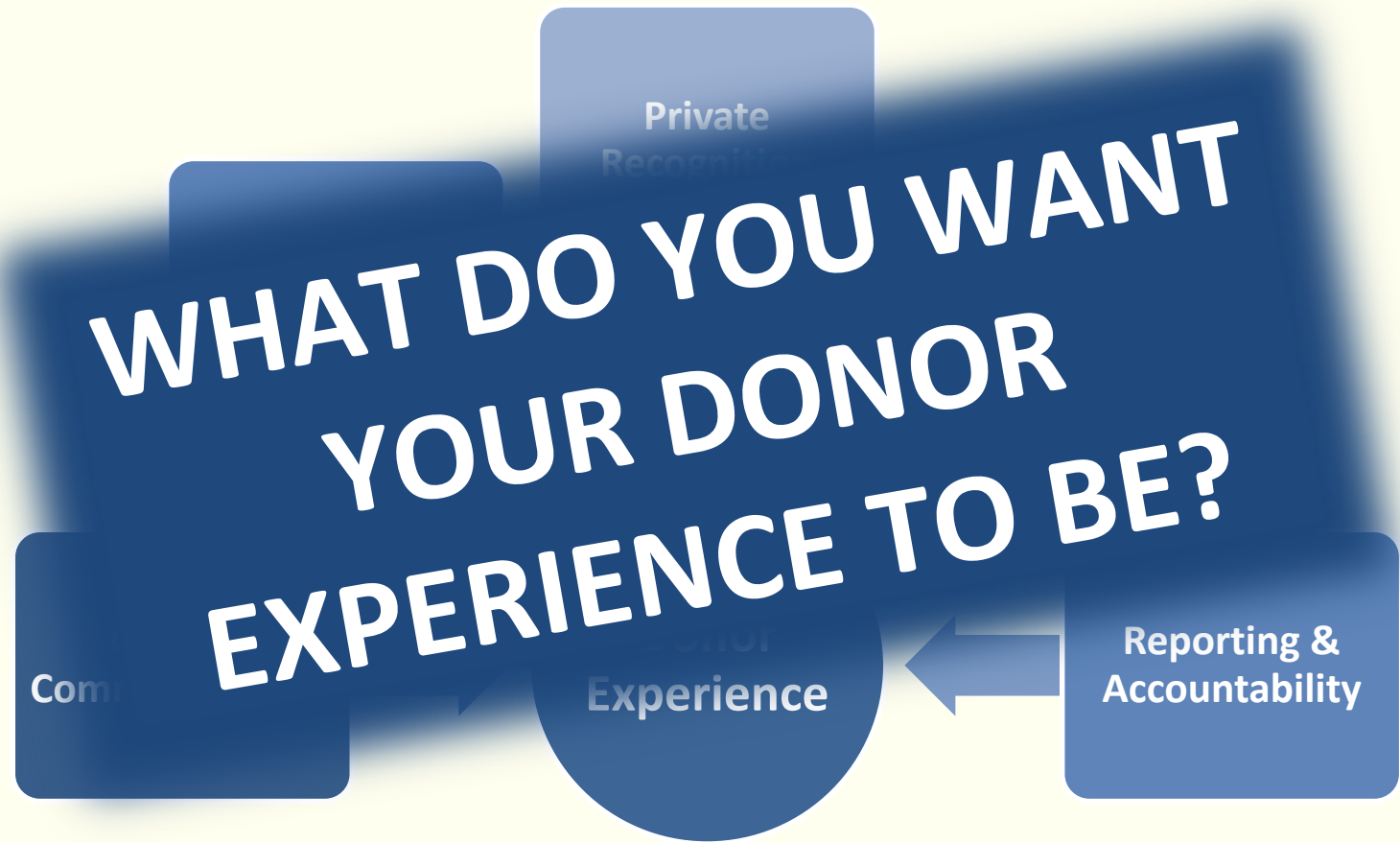


# ETHINKING DONOR EXPERIENCE

## NEW MODEL OF DONOR RELATIONS DONOR-CENTRED



# ETHINKING DONOR EXPERIENCE



**DONOR-CENTRED**



**DONOR RECOGNITION**

**A REFRESHED LOOK**





**NOR RECOGNITION STRATE**

A close-up photograph of a small green plant with a white flower bud growing out of a crack in asphalt. The plant has several green leaves and a single white flower bud at the top. The background is a dark, textured asphalt surface.

# PRIVATE VS. PUBLIC RECOGNITION



# DONOR ENGAGEMENT

A small green plant with a white flower bud is growing out of a crack in asphalt. The plant has several green leaves and a single white flower bud at the top. The background is a dark, textured asphalt surface.

**TRANSLATING YOUR VISION  
THROUGH RECOGNITION**



**RETHINKING COMMUNICATION  
WITH YOUR DONORS**

# THE NEW OLD STANDARD

- **Values-based recognition: Respect, caring, integrity and partnership – through authenticity and accountability.**
- **Donor recognition and stewardship is everyone's job.**
- **Private recognition that complements public recognition.**
- **Recognition tied to not only retention, but upgrade and acquisition.**

REFRESH

OUR DONOR RECOGNITION STRAT

# What's your Donor Recognition Strategy?

**REFRESH**

**OUR DONOR RECOGNITION STRAT**

What's your Donor  
Recognition  
Strategy?  
**Beyond Donor  
Retention?**



**REFRESH**

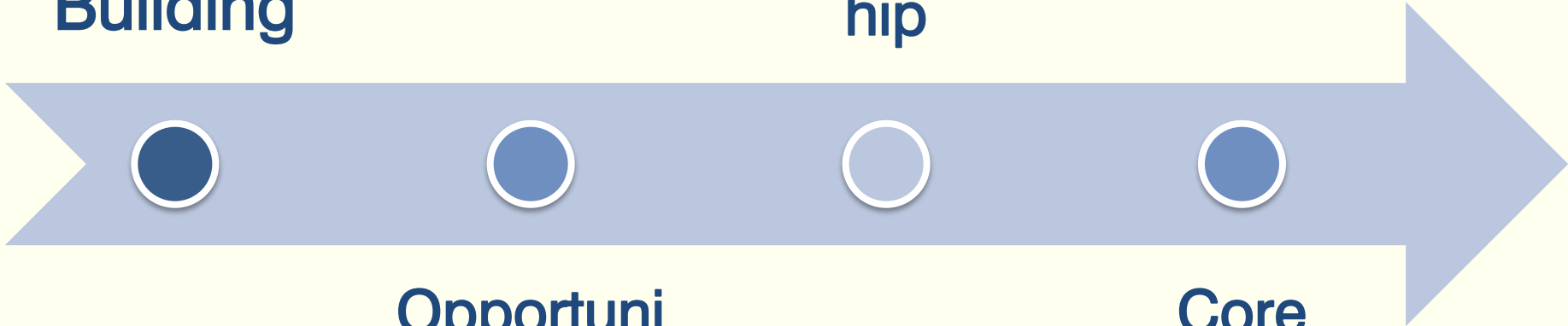
# **OUR DONOR RECOGNITION STRATEGY**

**Community Building**

**Culture of Recognition & Stewardship**

**Opportunity for Future Impact**

**Core Function**



# PUBLIC VS. PRIVATE RECOGNITION



# PRIVATE RECOGNITION

- **Anniversary of giving**
  - Donor “birthday”
- **Length of giving and cumulative impact**
  - Symbolic impact of giving
- **Success of past fundraising initiatives**
  - What is the ‘spin-off’ of philanthropic impact?
- **Inbound acknowledgement & recognition**



# DONOR ENGAGEMENT

## CULTIVATION & RECOGNITION

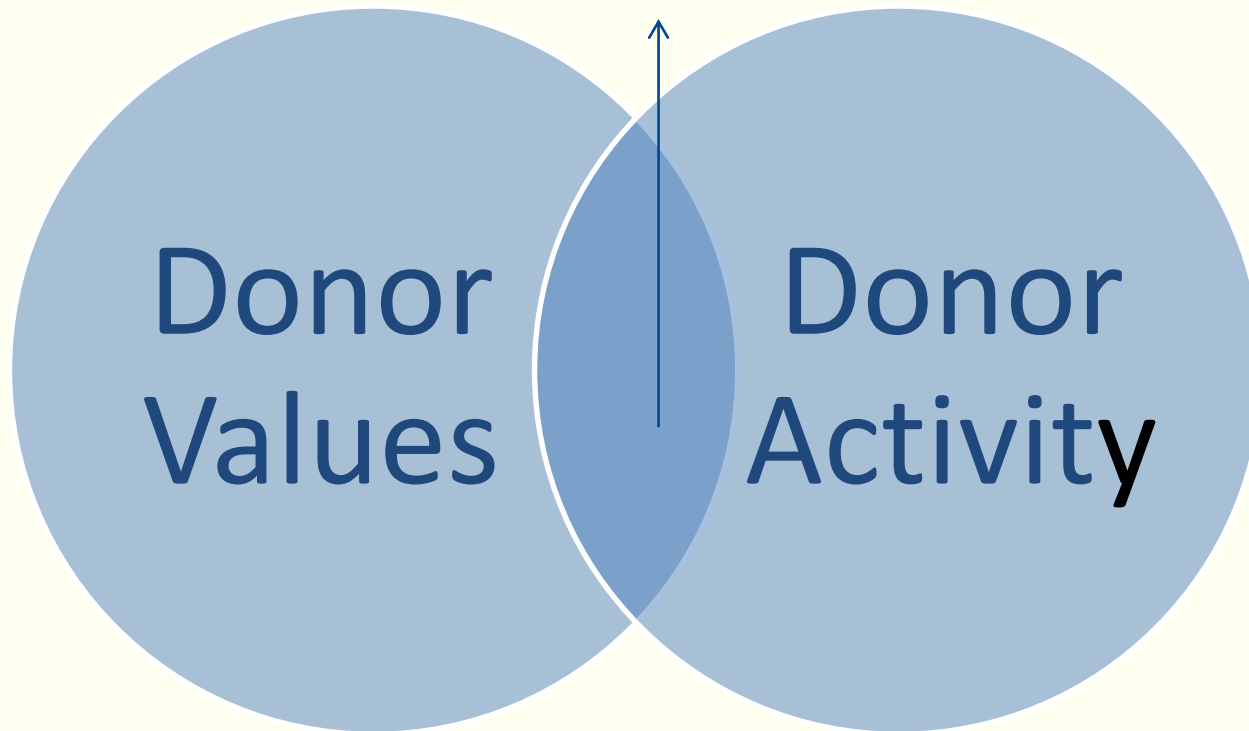
Hearing about activities, plans and opportunities for investment.

## ENGAGEMENT

Seeing activity first-hand, participating in activities, championing the mission.

# DONOR ENGAGEMENT

## Donor Engagement



# IMPROVING ENGAGEMENT

- Provide opportunity for interaction and involvement on a greater scale.
- Understand what your donors want their experience to be.
- Enhance institutional knowledge of your donors.

# TRANSLATING OUR VISION



# TRANSLATING OUR VISION

Focus on what  
has been done

**Focus on what  
can be done  
together**



# TRANSLATING OUR VISION

*Oh, the places we'll go...*

- Talk about what you hope to achieve – TOGETHER.
- How will philanthropy play a role?
- Symbolic value of donations – impact, outcomes.
- Communicate your big vision, plans.

# RETHINKING COMMUNICATIONS

- Private/ Human Recognition.
  - If you could talk to every donor in person, what would you say?
  - What *could* you say?
- Surprise and delight.
- Does your donor data give you options?
- Do you think about it strategically?

# The Grocery Store Rule

# RETHINKING COMMUNICATIONS

*Think about what you would say to a donor if you bumped in to them in the grocery store..*

- “Thank you!”
- “I remember our latest interaction.”
- Philanthropic impact and vision.
- Private recognition: “You have been a donor for over 10 years!”
- “How can we keep in touch?”

# EVALUATING DONOR RECOGNITION

- Ongoing dialogue with donors.
- Donor focus groups, online survey.
- Engagement measurement:
  - Online activity (social media, e-mail forwarding).
  - Donors acting as ambassadors, advocates.

# KEYS TO SUCCESS

- Strategic relevance.
- Infrastructure to track and measure recognition and engagement; Resources to support strategy.
- Donor intelligence.
- Transparency, relevant information on all channels.
- Culture of recognition and engagement.
- Opportunities for donors to become more engaged.
- Program that sustains motivation for giving.

# THANK YOU!

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