2019 End-of-Year Board Thanking Program

Goal: the intention of this program is to thank donors for their gifts just received. To that end, we would like to ensure that each donor receives a personal call from a board member within 48 hours of receiving the donor’s name and contact information.

Criteria for TY calls:
- Is a new donor in 2019 – any gift amount
- Makes a gift of $100 or over

Process:
1. HQ receives notice of donation
2. Lauren or Suzanne will send an email to a board member with donor information. We will rotate Board members.
3. Board member will call donor within 48 hours to thank them for their gift.
   a. It is OK to leave a VM.
4. If a VM is left, no follow up to Suzanne is necessary. We will assume that the calls were made. However, if you have a live call and you feel there is information to be documented, Board member fills out Call Documentation Form and emails to Suzanne.

Suggested Script

“Hi Mr. and Mrs. Name/ or first name:
I’m a volunteer on the Board of Directors of the Alliance for the Chesapeake Bay, and I’ve just been informed that you have given us a gift for the first time. I wanted to call you myself to say how very much we appreciate your support.”

Wait for donor to respond. Most calls are quite short - the donor may just say thank you, or “that's kind of you to call.”

Respond with: “Have a great evening”

If VM:

“Hi Mr. and Mrs. Name/ or first name:
I’m a volunteer on the Board of Directors of the Alliance for the Chesapeake Bay, and I’ve just been informed that you have given us a gift for the first time. I wanted to call you myself to say how very much we appreciate your support. I hope you're having a great day. Again, thanks for choosing the Alliance!”

Helpful Tips:
- Avoid comments that could be construed as another request for a gift or a lead-in to such a request. I.e. “We are grateful for your gift and hope you will continue to support us in the future”. This suggests that another appeal is coming and we don’t want to focus the donor’s attention on that at this time.

- Sometimes a donor will ask how our organization is doing and he/she may want information about a particular program or service. If you are comfortable answering the donor’s questions, by all means do so. If not, you could suggest that the ED or Program Director could contact them separately. Do NOT suggest that the fundraiser will call, unless the donor’s request is about fundraising or gift administration.

- On the rare occasion that a donor offers another gift or inquires about volunteering, definitely engage in that discussion as long as you feel well enough informed to “close the sale”. You can also say that you will ask the CEO to follow up if you feel the donor want to discuss details that take you out of your comfort zone.

**Follow Up:**
If the donor offers information about themselves, makes comments about our organization, or says anything else of note, please record it on the attached “Call Documentation Form”.

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