

THANK

YOU

Thank You

Donor's Relations Plan Assignment

Prepared For: Robyn T.

Course: FUND 5555 Prospect Research and Stewardship

Assignment: Donor Relations Plan - Final Assignment

Prepared By: Michelle de Ocampo-Ga

Due Date: Tuesday April 14, 2020

Donor's Relations Plan

Corporate Partnership: Benjamin Moore



Overview

Benjamin Moore has just signed a 3-year gift agreement for \$1M with your Habitat for Humanity, Canada and will incorporate employee giving into their giving.

Mission

Seeking to put God's love into action, **Habitat for Humanity** brings people together to build homes, communities and hope. Core Principles: Demonstrate the love of Jesus Christ.

Vision

A world where everyone has a decent place to live.

Background

Habitat for Humanity is a Non-profit organization Founded by a farmer and biblical scholar, Clarence Jordan. In 1973 eventual founders, Millard and Linda Fuller developed the concept of partnership housing and piloted this project over to Congo, Central Africa. In 1976 Habitat for Humanity International was established and moved back to the United States. The first movement to Canada occurred in 1985, where the first home built in Winkler, Manitoba. Two years later, Winnipeg became the first local Habitat in Canada.

Habitat for Humanity works globally to build and improve homes. A stable home contributes to the overall health and well-being of people in local communities.

As part of Habitat for Humanity's Stewardship process, a donor's Relations Plan has been procured to help create a lifelong relationship between our organization and Corporate partners.

Acknowledgement of Funds

When Habitat for Humanity receives a donation, necessary steps will be taken to ensure acknowledgement of funds are in place. There are four ways of how donations can be made.

Online donations made through the website link is the most common way to donate. Once a donation has been made, a thank you email will be sent within 24 hours to acknowledge the receipt of funds, followed by a personalized email. To extend our gratitude and sometimes the email may be sent to the recipient's, a follow up phone call will be made after one week of when the email was sent.

If cheques are **received by mail**, similar steps will be taken. A personalized thank you email will be sent (if there is one). As an alternative, a phone call will be made. Even if the donor's email address exist in our database and a personalized email was sent, a phone call is still required. A personalised thank you letter will also be mailed to the donor. It is important to acknowledge the receipt of funds the same way as it was received.

Face to face donations via Special Events, especially for a larger donation are recognized in a different form of acknowledgment. It depends on the location of where the funds were received. If it were received in the office, a formal handshake, a certificate will be printed immediately and framed to be given face to face. If the funds were received during a Special Event, typically this would be planned ahead of time. A special plaque/certificate would be given either during or after the ceremony. An acknowledgment letter would be mailed along with the tax receipt within 24 hours. Lastly, a follow up phone call will be made after one week.

Mobile App donation is a **new** pilot Habitat for Humanity has in place. An automatic 'Thank you' text will be sent as acknowledgement of donations were received. A personalized email will be sent with a tax receipt within 24 to 48 hours of when donation was made. Lastly, a follow up phone call will be made.








It is important for the two ways to acknowledge receipt of funds. First is via email. It is important to have something in writing that can be tracked and to avoid any discrepancies. Second, it is important to take time to make a phone call in case the donor has any questions/comments and it is a great way to connect.

Acknowledgement of Funds			
Online Website	Mail	Face to Face	Mobile App – NEW
<ul style="list-style-type: none">• Thank You email within 24hrs• Personalized email 48 hrs• A phone call after one week	<ul style="list-style-type: none">• Personalized Thank you email upon cheque received• Thank You Letter• A phone call after 48 hrs of email sent	<ul style="list-style-type: none">• A personalized certificate will be given, depending on the donation tier.• A letter of acknowledgement will be mailed within 24 hours• A phone call after one week	<ul style="list-style-type: none">• Automatic Thank You text• Personalized email 24-48 hrs• A phone call after one week

Recognition of Donation

Currently, Habitat for Humanity has different coloured tier levels of donation recognition in place, each representing a colour from Bronze to Sky Blue. It is important to recognize all donors regardless the amount of their donation. Therefore, two additional colours have been added, Navy Blue and Teal.

When a donation has been made, a letter/email will be sent a week after a week with a logo of a house associated with the colour as recognition of donation. A recent photo of how their donation has made an impact will be given to the customer via mail/email. The photo will have a border frame matching the tier colour. Our donors will also be recognized every month on our websites and a monthly newsletter will be sent via email.

Recognition of Donation						
Legacy	Platinum	Gold	Silver	Bronze		
\$2,500,000 Million and +	\$1,000,000 to \$249,999.99	\$500,000 to \$999,999.99	\$250,000 to \$499,999.99	\$100,000 to \$249,999.99	\$10,000 to \$99,999.99	\$0.01 to \$9,999.99
						

Engagement of Employees

There are many ways to help employees engage with our organization. Developing a participation survey will help identify the number of employees. From there, our organization can execute multiple various ways of engagement opportunities. Our Corporate Relationship Manager will visit all Benjamin Moore on a monthly basis to continue with stewardship and engagement.

- Invite to Special Events with volunteer opportunities
- Create an Annual Giving Campaign
- Host a quarterly Lunch and Learn to educate employees more about our organization
- Casual Workday is simple and easy way to raise funds.
- Establish a payroll giving program
- Recognize top branch and top employee giving and volunteerism will motivate others to donate
- Match Employee Donations

Employee Engagement Plan		
Frequency	Activity	Assigned To
Weekly – Fridays/Saturdays	Casual Workday outfit	Program Coordinator
Monthly – 15 th / 16 th	Lunch and Learn	Events Coordinator
Monthly – End of month	Payroll giving program	Stewardship Officer
Monthly – Second Friday	Rewards and Recognition	Stewardship Officer
Semi – Annual	Special Events for volunteering	Events Coordinator
Annual Campaign – May	Annual Giving Campaign	Stewardship/Events Dept.
Annual Campaign – November	Stewardship Event	Stewardship/Events Dept.

Promotion of the Partnership

Collaborating partnership marketing helps both the organization and corporate reach out to people who are interested in their products, services, and/or non-profit organization's mission.

- Create a co-branded advertisement for local newspaper and Corporate Responsibility reports.
- Social Media platforms is cost-effective and easy to navigate
- Announcements Non-Profit Organization and Corporate websites
- Invite each other to Special Events/Trade Shows, including third-party events
- Promotion in both premises. ie. Habitat for Humanity Branches / Benjamin Moore Retail Stores

Promotion of Partnership		
Frequency	Activity	Assigned To
Daily	Social Media Platforms	Social Media Coordinator
Monthly	Monthly newsletter via email	Marketing Team
Monthly	Recognition on websites	Digital Marketing Team
Monthly	Visit Benjamin Moore Retailers	Community Manager
Annually	Trade Shows / Special Events	Stewardship/Events Dept.

Communication of Success of Program/Impact

It is important to communicate the organization's success of programs to show how the donor's contributions made an impact. Sharing results is a way to measure the organization's success whether the program is feasible or may need to be revised in order to fulfill the mission. It is an opportunity for your donors to share their feedback and for the organization to continue with engagement.

Habitat for Humanity will share email reports to Benjamin Moore on a weekly basis via email during the first three months to evaluate the progress, including a face to meeting on a monthly basis. After three months, a monthly report will be shared via email, followed by a quarterly report, and annual report. The reports will consist of programs in place, number of participants including volunteers, a monthly budget report of where funds were allocated, and overview of the program plan.

Communication Methods

- Email Reports – Weekly, Monthly, Quarterly, Annually
- Face to face meetings – Monthly, Quarterly, Annually
- Corporate Responsibility Reports Booklet
- Follow up phone calls

Program / Impact Reports will include the following

- All programs, overview plan, including progress, participants, and volunteers in programs
- Budget report must include monthly expenses of where funds were allocated
- Detailed report of where funds were allocated

Communications Monthly Plan

May 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
					Email Report	
3	4	5	6	7	8	9
	Review budget report	Follow up phone call	Meeting with donors	Meeting with donors	Email Report	
10	11	12	13	14	15	16
	International conference call	Follow up phone call	On site visit	On site visit	Email Report	
17	18	19	20	21	22	23
	Review budget report	Follow up phone call	On site visit	On site visit	Email Report	
24	25	26	27	28	29	30
	Meet with marketing team to discuss progress Corporate Responsibility Booklet	Follow up phone call	Prepare monthly reports for upcoming monthly meeting	On site visit	Email Report Corporate Responsibility Booklet Monthly Meeting	

Stewardship Communications Plan

Frequency	Activity
January	Mail out Year End Reporting and follow up phone calls to all donors
February	Follow up calls to all donors – Interior Design Trade Show with Benjamin Moore
March	Host monthly lunch and learn – Send out invites for May's Restore Furniture Event
April	Post for volunteer opportunities for summer construction
May	Restore Furniture Event – Volunteer Opportunities
June	Host monthly lunch and learn – Barbecue Fundraising Event – Volunteer Opportunities
July	Construction – Building A Project – Volunteer Opportunities
August	Construction – Building A Project – Volunteer Opportunities
September	Host monthly lunch and learn – Send invite to Annual Stewardship Event in November
October	Follow up guest attendees – Make the Ask
November	Year End Stewardship Event for all Corporate Partners
December	Mail out holiday cards – Send Annual Reporting to all donors

Our impact in 2018

238 families began building strength, stability and independence through affordable homeownership. Over 1,000 individuals in Canada were served through our affordable homeownership program.

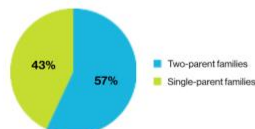
Approximately 2,250 Canadian families continued to benefit from their Habitat partnership, paying down their no-interest Habitat mortgage with affordable, geared to income payments.

Historically 3,619 families in Canada have partnered with Habitat to buy their own home since 1985.



Globally, Habitat for Humanity International has helped more than 22 million people build or improve the place they call home.

Of the 238 families that moved into a Habitat home in 2018:



612 children moved into Habitat homes



30 were Indigenous families



16 were newcomers to Canada (arrived to Canada in the last five years)



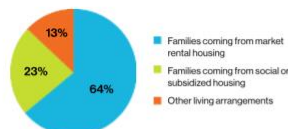
28% moved into homes designed with accessibility accommodations



Habitat's affordable homeownership program generated almost \$42 million in social benefits to the community.



\$68 million was added to the affordable housing portfolio in Canada, representing the new Habitat homes built in 2018.



Through Habitat Canada's international support, almost 1,800 people in Malawi, Kenya, Uganda, Nepal, Vietnam, Haiti and the Dominican Republic were served through new home construction, home renovations, improved access to water and sanitation through the construction of latrines and training in basic construction, home maintenance or property rights.

Habitat for Humanity Canada's Global Village volunteers have donated almost \$6 million to support Habitat's mission worldwide since the program began in 2005.

Over 1,700 people were served through new home construction, home renovations, training and improved access to water and sanitation through the construction of latrines.

Through other Habitat for Humanity housing programs in 2018:



Almost 200 Indigenous youth and women were engaged in training and skills opportunities.



Over 13,000 youth received on-the-job skills training, building confidence and personal leadership skills.



Over 51,000 volunteers helped local Habitats across Canada build homes, operate Habitat ReStores and engage their communities in the work of Habitat.



Over 1,250 volunteers traveled with Habitat for Humanity Canada's Global Village to build and improve homes in Canada and abroad.



Globally, almost 18,000 households were reached through water, sanitation and housing microfinance projects which helped people access new knowledge, community facilities, financial resources and expertise that will improve their quality of life.



Approximately 2,250 Canadian families continued to benefit from their Habitat partnership, paying down their no-interest Habitat mortgage with affordable, geared-to-income payments.



There are over 100 Habitat ReStores across Canada, and over 1,000 Habitat ReStores around the world. This successful social enterprise is a Canadian idea that helps local Habitats build more homes.

Report on the stewardship of the funds raised

It is important to keep track of stewardship reports of where funds raised to continue with relationship-building and prospect opportunities. It is also an opportunity to update your database of contact information to send monthly reports and follow up phone calls. Keeping track of stewardship of the funds raise will help determine which areas were successful and which ones are not.

Habitat for Humanity keeps a separate list of contacts for different campaigns and events. This will give our organization the opportunity to cross-reference donors and their guests to attend/participate in future campaigns/events. This information will also be very important to monitor to include in the Corporate Partnership Responsibility Report.

Report on the Stewardship of Funds Raised

Date	Activity	Donor Name	Donor Contact	Donation Amount
February	IDS Trade show with BM	Benjamin Moore	benjaminmoore@email.com	\$500,000.00