

# Balancing personalized stewardship when every supporter matters...

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# What's Your Charity Season Score? - Tally up how many of these sound way too familiar...

- Weekend Warrior You've worked more Saturdays than you've had lie-ins lately.
- The Accidental RSVP You called just to say hi... now you're bringing cupcakes to their fundraiser.
- The Justifier "But they're so lovely!" is your go-to reason for working at 8pm.
- **TOIL Troll** You've got enough Time Off in Lieu to take a sabbatical... but somehow never do.
- The £250 Cheerleader You've attended events that raised less than your weekly grocery bill—and still clapped like it was a million.

# Your Scorecard...

- 0–1: The Unicorn 4 Who are you? Teach us your ways!
- 2–3: The Juggler name of You're balancing it all like a pro—but maybe sneak in a nap this weekend?
- 4–5: The Fundraising Flame You're on fire! Passionate, dedicated... and possibly in need of a holiday.

WHY DO WE DO THIS TO OURSELVES???

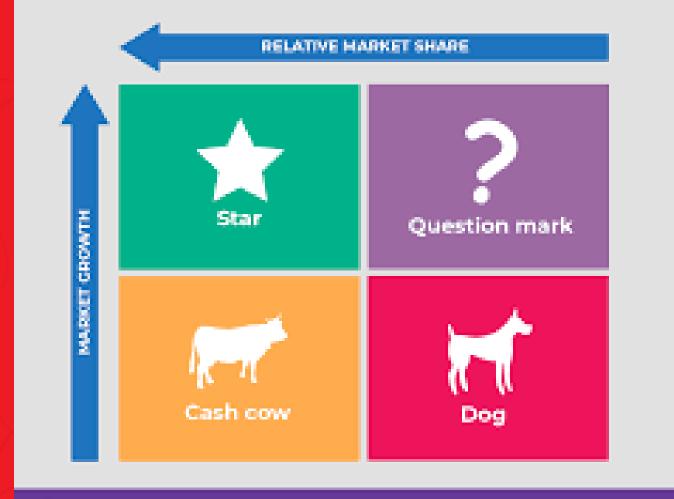
"At it's core, community fundraising is a celebration of everything good about humanity" – Kevin Delaney

### **Supporters & Events**

- Expectation management
- Say no... nicely!
- Test / trial & evaluate
- FR 'audit'?



### BOSTON CONSULTING GROUP MATRIX





MARKETING THEORIES EXPLAINED

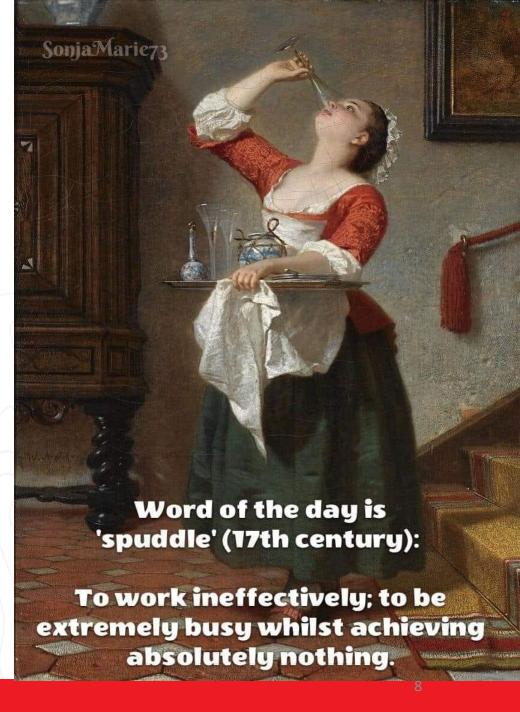
	В		Foot	fall / Reach		Vov Audiona	Sum a way with a succe	Future COTV netential				
£	Sole	Joint	Not	5,000+	1-5,000	500-1,000	under 500	key Audience	Synergy with cause	Future COTY potential		
£20k+	SSA	SSA	SSA	SSA	SSA	SA	SA	SSA	SSA	SA		
£10-20k	SA	SA	SA	SA	SA	SA	VA	SA	SSA	SA		
£5-10k	SA	SA	VA	SA	SA	SA	VA	SA	SA	SA		
£2.5 - £5k	SA	SA	VA	SA	SA	VA	VA	SA	SA	VA		
£1-£2.5k	SA	VA	VA	VA	VA	VA	VA	VA	SA	VA		
£500 - £1k	VA	VA	VA	VA	VA	VA	VA	VA	VA	VA		
under £500	МО	MO	D	D	D	D	D	D	D	D		

,				
	£ marketing / promotion	add to events	social media	website
SSA - Senior Staff				-
attendance / poss				
Trustee	Y	Υ	Y	Υ
SA - Staff				$\bigcap / \bigcup$
attendance	N \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Y	Y	/ Y/
VA - volunteer				///
attendance	N	N	?	Y
MO - Materials only	N	N	N	Y
D - decline	N ////	N	N	N /

# **Quality vs quantity**

- ▶ 50% of average workers time spent on non-productive work
- ▶ 20% of activities get 80% of results
- Focus on your top 'x' things / people / activities to get results
- Apply aggregation of marginal goals

"We didn't improve one thing by 100%, we improved 100 things by 1%" - Clive Woodward



# Maximising resource...

- Know your worth
- Is it worthwhile?
- Are *you* best fit?
  - Consider skills / interest / geography
  - Use of volunteers
- ▶ Tools to help inc. Al...

Above all... don't be a martyr and avoid burn out!!



# Stewardship

- Value of relationships
- 'thank you' is key!
  - Thank you day
- Stewardship tiers
- Reward & recognition awards?
- Ways to communicate & 'Old school' methods

"PEOPLE WILL FORGET WHAT YOU SAID, PEOPLE WILL FORGET WHAT YOU DID, BUT PEOPLE WILL NEVER FORGET HOW YOU MADE THEM FEEL"

~ Maya Angelou



		Supporter Led									Supporter Led								
			Tier 2	Tier 3	Tier 4		Tier 6	Tier 7	Tier 8			Tier 1	Tier 2	Tier 3	Tier 4		Tier 6	Tier 7	Tier 8
		Bronze	Bronze	Bronze	Silver	Silver	Gold	Gold	Gold		Gold / Silver / Bronze (CEFT)		Bronze			Silver	Gold	Gold	Gold
			£500-	£1k-	£2k-	£5k-	£10k-	£20k-			· · · · · ·	1		£1k-	£2k-	£5k-	£10k-	£20k-	
£ level	Stewardship	> £500	999	1,999	4,999	9,999	19,999	49,999	£50k +	£ level	Stewardship	> £500			4,999	9,999	19,999		£50k
	Fundraising support pack with ideas	✓	✓	✓	✓	✓	✓	✓	✓		Supporter Care thank you letter	All TY letters to be send from CF team							
	Provide events calendar	✓	✓	✓	✓	✓	✓	✓	✓		Certificate of recognition to display	1	1	1	1	<b>√</b>	1	1	1
	Proudly supporting t-shirts		✓	✓	✓	✓	✓	✓	✓		Thank you letter from Fundraising Manager			1	1	1	-		
	Tech T / Running Vest	N/A									Thank you letter from Head of team			/ -		_	1		+
	Base Visit	N/A									Thank you letter from Director of Fundraising				H/I			//	_
Pre-event / activity support	Sim suite tours				✓	✓	✓	✓	✓	Post event / activity / donation	Thank you letter from CEO	)						<b>√</b>	7 ,
	Invite to charity office (Stokenchurch)			✓	✓	✓	✓	✓	✓		,					(	· /		<b>  '</b>
	Dedicated account management		✓	✓	✓	✓	✓	✓	✓		Acknowledgment of support in newsletter	+/-	<del>  ,  </del>		<b>V</b>	<b>V</b>	V	<b>√</b>	<b>✓</b>
	Phone call ongoing support	✓	✓	✓	✓	✓	✓	✓	✓		Acknowledgment of support through #FF	₩.	<b>V</b>	<u>√</u>	<b>✓</b>	<b>√</b>	1	<b>√</b>	<b>✓</b>
	F2F meeting with staff member - single		✓	✓	✓						Cheque presentation with volunteer	<b>√</b>	<b>V</b>	<b>√</b>			\		4
	F2F meeting/s with staff member - multiple					<b>√</b>	✓	✓	✓		Cheque presentation with staff			/	✓	✓	✓	✓	<b>√</b>
	F2F meeting with Head of/FR Director						✓	✓	✓		Meeting CEO						1	✓	
	F2F meeting with senior staff (Ops/CEO/Trustee)					✓	✓	✓	<b>√</b>		Meeting Trustees						✓	<b>✓</b>	
	Bespoke events (for eg with their staff)	N/A					Invitation to annual TVAA donor thank-you event		<b>✓</b>	1	1	<b>✓</b>	✓	<b>√</b> /	~				
	Bespoke events with sponsorship opportunity	N/A									Invitation to corporate events (networking/TVAA	N/A							
	Support materials - basic e.g. literature, stickers,					-	//		organised)	N/A									
	giveaways (postable)	✓	✓	✓	✓	✓	✓	✓	✓		Invite to other TVAA special events	\	/ /		/	<b>√</b>	<b>/</b>	/ /	7
	Support material - inc. merchandise, banners, gazebo,										On first gift enter new supporter welcome journey								
	tablecloth (delivered)		✓	✓	✓	✓	1	<b>V</b>	✓ /		when in place	N/A							
OTD	Attendance at event/activity - Senior staff inc. G1 /						-				e-newsletter (if opted in)	1	7.7	./	./	./		./	V
	Trustee level						✓	✓	1		Newsletter mailed	1	/ /		<b>V</b>		\		V
	Attendance at event/activity - crew / ops					✓	✓ \	✓	1		11 1 3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	<b>V</b>	<b>_</b>				V	<b>'</b>	
	Attendance at event/activity - staff			✓	✓	✓	✓	✓	1		Newsletter emailed	Is this not the same as Row 48?							
	Attendance at event/activity - vols		✓	✓	✓	✓	✓	✓	1	Ongoing	Monthly meeting with FR Manager								
	Event details on website		✓	<b>✓</b>	✓	<b>✓</b>	✓	✓	✓	relationship	Quarterly contact (£ report)								
	Use of TVAA 'proudly supporting' or 'in aid of' logo on							1////			Quarterly meeting with Fundraising Manager								
	supporters website, & literature							11/11			Bi-annual acknowledgment of FR income								
		✓	✓	<b>✓</b>	✓	<b>√</b>	✓	✓	<b>√</b>		Annual acknowledge of FR income (TY) with impact	Thes	These are more relevant for MG team - it is more commo						non t
Marketing	Support organisation / event through social media							$\Lambda \Lambda$	///		stories	meet supporters a few times before their events, and then						n pla	
	channels (add £ symbol for paid posts)							$\langle \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	///		Bi-annual meeting with Fundraising Manager		bi-annual/annual catch-up						
	/			1	√ -£	√ -£	√ -£	√ - <u>£</u>	√ - <u>£</u>		Annual call/meeting with Fundraising Manager	- J. G. Maria and G.							
	Social media promotion - Facebook	N		<b>✓</b>	√ - <u>£</u>	√ - <u>t</u>	√ - <u>f</u>	√ - <u>£</u>			Bespoke end of year impact report								
		-		<b>V</b>	√ - <u>f</u>	√ - <u>f</u>	√ - <u>f</u>	√ - <u>f</u>	√ - <u>f</u>		Send/email copy of Annual Review								
	Social media promotion - LinkedIn Partnership launch		L	<b>V</b>		N/A	V -I	V -t	V -I		Send/email TVAA impact report	-							

## Planning top tips

- Know what you want to achieve
- Less is more...
- Focus on top performing
- Be flexible
- Celebrate success!





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