



START
HERE

How to Create a Donor Matrix for Your Nonprofit

A donor matrix chart is designed to show how, and when, your organization will steward each donor segment.

Make a list of all donor communications.

01

Let's start with the basics. A good donor matrix should encompass every touchpoint and communication a donor to your organization receives, and it should be broken down by behavior. To begin developing a donor matrix, start with a list of every touchpoint for each donor, regardless of amount:

- Tax receipt
- Acknowledgment
- All additional recognition
- Digital communications (general or personalized)
- Print communications (general or personalized)
- Event invitations
- Holiday/seasonal messages

Create a list of donor behaviors and identify which behaviors you want to build a plan for.

02

The next step is identifying behaviors you want to recognize in the donors at your organization. We've included a sample list below. Remember, when making a list, you don't need to have a plan for each donor behavior right away. This step is all about identifying the donor behaviors you would like to develop a plan for. After this, you will start to build out your donor retention program:

- First time donors
- Giving day donors
- Honor and memory gifts
- Pledge payments
- Reacquired/lapsed) donors
- Increase/double donors
- Monthly donors
- Project/crowd/funding donors
- Loyal donors (giving milestones)
- Faculty and staff donors (one-time and payroll deduction)
- Named fund donors
- Planned giving donors
- Matching gift donors
- Event attendees

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Include input from other departments.

03

A donor matrix should encompass all touchpoints for your donors from across your organization. When brainstorming which teams should provide input and samples of their communications to the matrix, be sure to include the following groups:

- Donor Relations
- Annual Giving
- Events
- Communications
- Advancement Services
- Development Officers
- Any other team that regularly communicates with donors

Start building your matrix.

04

After compiling all communications, events, and general touchpoints you have for each donor behavior, you are ready to build out your donor matrix.

There are several formats you can use when developing your donor matrix, so it's important to find the layout and structure that works best for your organization. Remember, this is a fluid document, and it should be created with the knowledge that it will continue to evolve.

Below is an example of a donor matrices that is inclusive, easy to follow, and address many of the donor behaviors listed above.

SAMPLE 📌

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SAMPLE



CAMPUS WIDE STEWARDSHIP MATRIX

This matrix **does not include** donors who give **only** to WUOT, **only** to Athletics, **only** to UTIA, or stewardship at the college or unit level. Donors may receive additional touch points from these areas.

FIRST-TIME EVER DONORS
(weekly)

To UT Knoxville (to any allocation)

1. Email—sent approx. 1 week after gift
2. First Time Donor Packet—sent approx. 1 month after gift
3. Phone Call from a student—approx. 3-4 months after gift
4. Impact Video—sent approx. 6 months after gift
5. Anniversary Email—sent 1 year after gift

LOYAL VOL DONORS
(quarterly)

Monthly, including payroll deduction

4 quarterly touches—sent in the 2nd month of quarter

- 1st quarter: Postcard with coaster
- 2nd quarter: ThankView video from students
- 3rd quarter: Email with digital downloads
- 4th quarter: ThankView video from chancellor

REACTIVATED DONORS
(monthly)

Made a gift this fiscal year but not in the previous fiscal year

- Welcome Back Postcard
- Call from a student

STANDARD PLEDGE DONORS
(ongoing)

Once a pledge is paid in full

Postcard acknowledging their commitment has been fulfilled with gratitude message

FISCAL YEAR DONORS
(weekly)

To any non-academic unit throughout the fiscal year.

- 1st Gift—Email (student)
- 2nd Gift—Postcard (student)
- 3rd Gift—Email (student)
- 4th Gift—Postcard (faculty)
- 5th Gift—ThankView (student)
- 6th Gift—Card signed by student with sticker sheet

TENNESSEE TRUE DONORS
(annual)

2+ years consecutively (to any allocation)

Decal Mailing—sent annually in January (based on prior FY giving)

MID-LEVEL DONORS
(monthly)

\$1,000-\$24,999 (to any allocation)

Card with magnet

To view examples of these touch points, please visit alumni.utk.edu/resources



IN ADDITION

ALL DONORS RECEIVE

- Gift confirmation email (online gifts only)
- Gift receipt (once gift processed by Constituent Management)
- Pledge reminders (all standard pledges)
- "Grateful Vol Day" ThankView (Sept.)
- Fiscal Year Annual Report (Sept.)
- Valentine's Day ThankView (Feb.)
- "gratitude." newsletter (fall and spring)
- Tax summary email (annually by Constituent Management)
- "Thanks for Tanks" ThankView (May)

SOME DONORS RECEIVE

- "Grateful Vol Day" thank you postcard (Sept.)
- "Thanks for Tanks" thank you postcard (May)
- Big Orange Give day-of and post-campaign stewardship
- Volunteer impact emails
- Thanksgiving and/or Holiday Card
- Big Orange Family Campaign Impact (faculty/staff)
- Invitation to a Tennessee Tailgate

NOTE: Other ad-hoc or campaign-specific stewardship efforts are handled year-round, as needed.

MAJOR GIFT DONORS AND SPECIAL AREAS OF SUPPORT

CHANCELLOR'S CIRCLE MEMBERS
(fiscal year)

\$1,000+ cumulative to chancellor allocations: Campus Fund for UT Knoxville, Chancellor's Excellence Fund and Endowment, and Named Chancellor's Excellence Endowments

- New Members—Welcome packet (including letter from chancellor, two lapel pins, and a plaque with hand-signed certificate).
- Renewed members—Updated packet (with updated hand-signed certificate from Chancellor and letter signed from VC for Advancement)
- Chancellor's Circle Impact Report—sent annually in August
- Birthday Postcard
- Mailed Tennessee Tailgate invitation

MAJOR GIFT COMMITMENTS
(ongoing)

\$25,000 or more to a central campus academic allocation

- Mailed packet with hard copy of gift agreement + a letter from VC for Advancement.
- Letter signed by VC for Advancement—sent approx. 1 week after gift.
- Letters are sent for gifts of \$25K+ to any allocation on campus.

TORCHBEARER SOCIETY
\$1,000,000+ (cumulative)

\$1 million or more (cash in-hand) to any allocation, including Athletics

- Welcome Box including custom scarf or tie and a custom plaque—sent within month following qualifying gift
- Hand-signed Birthday Card from VC for Advancement
- Listing on website and on digital displays in Andy Holt Tower and Tyson Alumni Center
- Fiscal Year Annual Report (with custom cover, envelope, and signed note from primary DO (sent in September).
- 20-25 couples in this group also receive custom annual reports unique to their giving (sent with personal note from VC for Advancement).
- 30-35 top donors in this group receive personal custom birthday videos—annually
- Torchbearer Society members often receive additional ad-hoc engagement or touch points throughout the year for special celebrations or milestones.
- Mailed Tennessee Tailgate invitation

GIFT PLANNING DONORS

Bequest or other type of planned gift to UT

- Welcome ThankView Video—sent monthly for new planned giving commitments
- Impact report—sent annually in June
- Invitation to Celebration of Generosity Event—sent annually in the Spring

\$100,000+ DONORS

Donors who have a lifetime commitment (including pledges) of more than \$100,000 to any allocation

- Signed Birthday Card from VC for Advancement
- Thanksgiving Card from VC for Advancement

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05

Put your matrix to use!

Once you have your donor matrix created, it's time to put it to use. We recommend focusing on 1-2 donor behaviors to tackle and build out in your donor matrix each year. It could be first-time donors and planned giving donors, or perhaps you want to hone in on reactivated donors. Be sure to utilize your data to drive your decision, and then start building out your plan and donor touchpoints.

After creating your communications, deliverables, and timelines for these donor segments, you'll add it all to your donor matrix. As you design and continue to add to the plan, gaps and opportunities will start to appear in your donor relations program. Let those opportunities guide your future efforts to increase donor retention. Speaking of retention rates, don't forget to provide metrics around your donor relations efforts. See below for some metrics you'll want to include:

- First time donor retention year-over-year
- Overall retention year-over-year
- Additional gifts within one year
- Quantity of donor touchpoints/tiered
- Communication stats (open, click through, download, response, etc.)

The donor matrix is a powerful resource in guiding your donor relations program. When implemented correctly and referenced by all members of your organization, the matrix will provide your team with insight into giving behaviors and triggers. Additionally, it protects you from the common pitfall of mainstreaming donors. It gives you a multi-touch, multi-channel approach to donor communications and provides a clear overview of your program.

If you would like additional assistance developing a donor matrix specific to your organization, DRG is here to help!

Contact info@donorrelations.com for more information on how DRG can help you.