Final Draft

Strategic Donor Base Growth Plan

2021-2026
Connecticut River Conservancy
Strategic Donor Base Growth Plan
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A strategic outline has been presented to implement actions designed to build and steward CRC’s community and donor base that specifically focus on tributary group members, volunteers (including S2S), youth and residential abutters of the Connecticut River. Actions include recommendations for data collection and analysis, defined reportable performance metrics, evaluation and implementation to build upon the programming over the next five years.

Data analysis on our existing donor base has been presented to support strategic action to steward and retain our existing donor base, and to increase the number of donors from within the CRC community.

Introduction & Context

When it was founded in the 1950s, CRC’s donor base consisted largely of white wealthy people, many of whom use the river for recreation. Over the years, our core supporters have tended to reflect that original demographic, and efforts to grow the size of our donor base significantly, have not been successful. It’s time to broaden the community of people connected to CRC, and it’s the best way for this organization to grow both in size and impact. The more that CRC can serve, speak to, and engage with a more diverse audience of people that interact in many different ways with rivers and with CRC’s work, the more our donor base will grow too.

Staff and board share this goal of diversifying and expanding the community of people who are part of CRC. When asked about their vision for the organization’s future, many staff and trustees envision a larger network of younger folks, people of color and people who live in urban areas adjacent to the river.

Furthermore, with the rise of the COVID-19 pandemic, inequities that have existed within our watershed for generations, and that have been painfully obvious to poor communities and communities of color, have been highlighted. There is a greater understanding that we are all interdependent, and that we all suffer when some within our community are denied their basic human rights to food, water, shelter, education, clean water and a healthy environment. It’s a unique time and it requires a unique response that responds to the current context. This is both a mission imperative, and a critical component of CRC’s continued financial sustainability.
This plan seeks to significantly broaden and diversify CRC over the next 5 years. By reaching more people and listening to more voices, we will grow the number of people who donate significantly.

**Strategic Donor Base Growth Actions**

There are many different groups that are compelling targets for CRC’s donor base growth efforts. The following groups represent the ones we plan to strategically prioritize in the coming five years.

I. Local Tributary Organizations

*Define this group:* All people who volunteer with or otherwise support / work with local watershed organizations throughout our watershed, including: people who are part of CRC’s existing affiliate groups, people who are part of CRC’s existing fiscal sponsor groups, people who are part of any other local watershed groups, and people who are part of local community or environmental justice organizations that interact with the river, whether we currently work with their group or not. Local groups may be formalized organizations or loose networks of local volunteers.

*Why is this group of interest:* Since its inception, a core part of CRC’s mission has been to help to grow local watershed groups and encourage local action for river protection. As a result there are now scores of small local watershed organizations throughout the watershed that we work with both formally and informally. The members of these groups are, by definition, CRC’s core constituency: people who understand and are committed to river conservation and are already actively working to further the cause. Many of these folks are already volunteers or donors to CRC (for example if they are members of an affiliate), however not all of them are. By bringing them even closer, we’ll also help to encourage deeper collaboration and coordination on program and on fundraising, and we’ll ultimately grow our donor list.

Additionally, CRC has unique resources to offer local groups, when it comes to information, expertise and program tools. Formalizing CRC’s role as a convenor/resource for local groups can help to increase capacity for our work across the watershed and at the same time, raise CRC’s profile. We can also act as a connector between groups and help to coordinate work on a greater scale.

Finally, particularly in the post-COVID-19 economic context, many local groups will struggle and some may find it difficult to make it through this rough funding climate. CRC’s help with organizational development and fundraising will be critical to ensure we don’t lose the decades of work the organization has already put into seeding and supporting these groups. Let’s help them survive and ultimately thrive so that as a watershed, we come through the difficulties ahead stronger than ever.
Action steps to take:

Within 1 year -

- Set up a system for tracking tributary members including: defining who is considered a “tributary member”, identifying those people in our existing list who are in this group, and setting up a protocol for coding tributary members in Virtuous. Data sources for this to include existing group codes, affiliate lists, etc.
- If immediate funding crises come up for local groups, work with them to try to accommodate/keep them afloat through help with fundraising/grant opportunities. If feasible, offer small ($5K or less) emergency mini-grants to organizations in crisis.
- Begin planning a watershed-wide conference or convening of all local and tributary organizations for 2022 or beyond. This could be in the form of a single conference, or a series of trainings/smaller group convenings, or both. Content could be shaped by feedback we receive from local groups as to what would be most useful, and by existing tools/skills we have within CRC already. Offer both resources/info from CRC, and the chance for local groups to share best practices and ideas and connect across the whole geography.
- Approach key existing local groups to formalize affiliations now. Whalebone Cove, SEVWA, etc.
- Develop a comprehensive communications strategy to affiliates.

Within 3 years -

- Hold the watershed-wide conference or convening of all local organizations and tributary members. This could be in the form of a single conference, or a series of trainings/smaller group convenings, or both.
- Reach out to partners: contact our existing affiliates, fiscal sponsor, and other watershed organizations we identify within our network via their leaders/boards to invite them to the conference. We’ll also identify a list of any existing watershed groups that we are NOT currently connected to, if any, and reach out to them about the opportunity. We’ll provide a sample email or outreach material that the group can send to their members, letting them know of the conference, and incorporate new data into Virtuous.
- Based on the feedback we get from the local organizations, begin to determine which program or organizational development areas we can be most useful in helping with beyond the conference. Continue existing programmatic and organizational partnerships, and offer new ones as we can.
- Establish additional ongoing channels of communication with these contacts, including text communication and email, social media and mailed pieces specifically for them. Set up and continue regular new opportunities for recognition/acknowledgment of their work in our existing communications streams.
- Continue collaboration with CRC staff on program and organizational needs as we can and look for new ways to leverage CRC’s resources to support local orgs.
Within 5 years -

- CRC has a smooth and well-organized tributary membership program, with local organizations’ members quickly plugged into our work, into our communications, and into opportunities for collaboration.
- CRC is viewed as THE convenor/umbrella group for our watershed, is well-respected and is seen as a generous ally by local organizations.
- CRC has an ongoing affiliate program with multiple affiliate organizations.
- Ongoing relationship building and collaboration with local organizations leads to more local groups choose to formalize their affiliation with CRC.
- More tributary organization members become donors, and more resources flow to CRC through <$100 giving.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:
- Number of local groups/watershed organizations participating in the program/collaborating with CRC.
- Number of tributary organization members who are donors to CRC.
- Engagement levels of tributary members in CRC via events, volunteering, collaborations, etc.
- Number of tributary groups formalizing an affiliation with CRC.

Metrics of success:
An increase in tributary members year over year is anticipated. We’ll also expect to see more connections/partnering happening between CRC and local groups on program and fundraising. We’ll expect more tributary members to attend CRC events and volunteer with CRC each year.

Data to be collected:
We will aim to capture full contact information (including mail, cell phone and email) from all conference attendees, along with permission to email them, text them, and contact preferences. These members will be linked via a relationship to the local organization they are a part of.

As tributary members participate in CRC activities, we’ll track that event attendance, volunteer and email engagement data in their records, along with all the communication they receive.

II. CRC Volunteers

Define this group: Any person who has registered to participate in a CRC volunteering position. To be tracked in segments detailing nature of volunteer activity - including but not limited to: Source to Sea volunteers and group leaders (by participation year), water quality monitors, species monitors, administrative volunteers, Tributary group program volunteers.
Why is this group of interest: As the boots on the ground who are enabling CRC to conduct such broad and extensive work throughout the watershed, the volunteer base is a vital part of our community and success as an organization. This group not only has a vested interest in our work, but a demonstrated commitment to it through the dedication of their time. Finding ways to engage and deepen our relationship with this vital group will not only enable CRC to sustain its tremendous impact on the ground but will continue to save us the money it would otherwise cost to contract with paid technicians to perform the work completed at no cost by our volunteers. By allocating more resources to stewarding relationships with our existing volunteers, we hope to continue and expand the vibrant, diverse and community-driven work being done on behalf of clean rivers throughout the watershed because of CRC.

Action steps to take:

**Within 1 year** - We plan to expand our existing volunteer programming to offer more opportunities for participation for residents of urban corridors, children, families, school groups, persons with disabilities and non-English speakers. We plan to create dedicated segments of our mailing and email communications that are written specifically to recognize the service of our volunteers. We plan to digitize all volunteer registration forms and require CRC staff to encourage digital registration by all volunteer participants. Websites for centralized communication, interaction and data, along with access to the scientists. Meaningful two-way relationship with community science volunteers. Community scientists as more than just data collectors. Talk with volunteer managers about strategy and what can be done.

Implementation of a year-round communications and engagement strategy and to S2S volunteers, including opportunities to engage in new ways through events and other volunteer opportunities, and providing opportunities to donate. This will include email and text communications post-cleanup, connecting people to other aspects of CRC's work including advocacy and community science, and continuing our segmented appeal strategy to thank S2S volunteers and ask them to donate.

**Within 3 years** - We plan to require all volunteer participants to register for service digitally via Virtuous. We plan to expand volunteer opportunities by introducing no less than 2 new volunteer programs aimed to provide access to residents of urban corridors, children, families, school groups, persons with disabilities and non-English speakers. We aim to introduce a loyal volunteer recognition program and targeted recruitment effort to encourage returning volunteers. We aim to continue segmented communications and fundraising appeals to previous and existing volunteers, inviting an annual donation at/below $100.

**Within 5 years** - We plan to require all volunteer participants to register for service digitally and eliminate paper registration options completely. We plan to expand volunteer opportunities by introducing no less than 2 new volunteer programs (4 total) aimed to provide access to residents of urban corridors, children, families, school groups, persons with disabilities and non-English speakers. We aim to continue targeted recruitment efforts to encourage and acknowledge returning volunteers. We aim to offer no less than 3 events annually that
prioritize volunteer location and interests, and implement volunteer-only event invitation mechanisms based on area of service. We aim to continue segmented communications and fundraising appeals to previous and existing volunteers, inviting a recurring monthly donation at/below $20 or an incentivized annual gift in excess of $100.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:
● Number of volunteer opportunities available.
● Diversity of volunteer opportunities available.
● Number of registered volunteer participants.
● Number of segmented communications written specifically to recognize volunteer service, as compared to general communications sent to volunteers that do not mention volunteer service.

Metrics of success:
• An increase in the number of registered volunteer participants from the previous calendar year will be a defined metric of success.
• Information sufficient to count volunteer participants (excluding Source to Sea volunteers) from all 4 states, and specified areas of high interest/impact (Hartford, CT; Springfield, MA; Hanover, NH; Keene, NH; Brattleboro, VT…) will be a metric of success.

Data to be collected:
From each volunteer, we aim to have a full name, complete mailing address, valid email address and current telephone number, and to know which volunteer positions they have held with CRC. We also aim to collect information on their preferred method of communication and interest in any other CRC program areas. We aim to match volunteer registrations to existing donor profiles within our system.

From each volunteer opportunity, we aim to track among the registered participants the following metrics of diversity and inclusion, who:
● Is a minor
● Has requested/communicated a need for accommodations.
● Has requested/communicated a need for materials in languages other than English
● As well as the geographic location in which all registered volunteers reside and work

Evaluation of success:

1 year - We will compare the number of registered volunteers with the data from the previous years to evaluate for increase/decrease and trends in location, seasonality and volunteer opportunity category. We will evaluate the data collected from each registered volunteer to evaluate for completeness and information sufficient to engage in meaningful communications. We will track response to segmented communication in terms of email opens/clicks and successful solicitations.
3 years - We will aim to have 20% increase in registered volunteers overall, and increases of any amount in the metrics for diversity of volunteer participants outlined above. We aim to increase the number of volunteer opportunities by 15% and introduce no less than 2 new volunteer programs. We aim to observe a 50% retention rate among returning volunteer participants, and a 25% conversion rate from volunteers to donors of any amount.

5 years - We will aim to have a 50% increase in registered volunteers overall, and 25% increase in the metrics for diversity of volunteer participants outlined above. We aim to increase the number of volunteer opportunities by 30% and introduce no less than 4 new volunteer programs. We aim to observe a 75% retention rate among returning volunteer participants, and a 50% conversion rate from volunteers to donors of any amount.

III. Youth

Define this group: Any individual youth (person under 18 years) or organized group of youth under the supervision of a non-CRC adult participating in a CRC activity.

Why is this group of interest: In addition to the high volume of schools and youth-focused community groups present in the watershed, CRC has observed a high frequency of inquiry from such groups for ways to contribute to the work we do. There is an engaged and invested cohort of young people throughout our service area communicating their interest in our work and their desire to join us in it. In addition to the numerous benefits to both the youth and the watershed in engaging the next generation of river protectors, most youth are accompanied by guardians that may also have an interest in CRC and an increased incentive to support our work if their children are already engaged with us programmatically.

Action steps to take:
1 year - We plan to determine a uniform system of coding data received on youth participants, as well as a targeted communication strategy that respects privacy and safety of youth. We plan to send one communication specifically designed for youth with CRC program information and metrics reporting, age-appropriate volunteer opportunities and at-home activity ideas to benefit the river. We plan to send one digital survey to all contacts currently coded as youth to collect data on their age group, river-related interests, geographic location, school affiliation and programming preferences.

3 years - We plan to develop communication strategies and materials for youth by age group (0-5, 6-10, 11-14, 15-18) and send a minimum of one targeted communication to each group per year. We plan to develop programming suitable for youth, incorporating youth feedback and staff capacity, resulting in a minimum of one event offered in each state each year that includes youth-oriented programming. We plan to continue to send annual digital surveys to youth contacts to collect data on the same metrics as defined in year one. We plan to add 1-3
additional youth-appropriate interactive activities to our reserve of events and tabling materials, available for use by all CRC staff or select volunteers as appropriate.

5 years - We plan to develop a multilingual youth-oriented program - River Rangers - composed of a combination of online and event-based programming that will lead participants through a certification process to be a river protector. The program will culminate in an invitation for the youth and family to become supporters of CRC, and feed directly into other areas of volunteer participation and engagement.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:
● Number of youth contacts over time, as compared to total number of CRC contacts.
● Number of school affiliations among youth contacts, and changes over time.
● Diversity of youth contacts on basis of age and geographic location.
● Number of participants in youth-oriented programming, including participants at tabling events in which interactive education activities are offered.
● Number of communications written specifically to target youth participants in CRC programs, as compared to general communications sent to existing contacts.

Metrics of success:
● An increase in the number of properly coded youth contacts from the previous calendar year will be a defined metric of success.
● Information sufficient to evaluate youth contacts on the basis of age, interest and location will be a metric of success.
● Information sufficient to evaluate school affiliation of youth contacts and changes over time will be a metric of success.
● Information sufficient to evaluate response and participation in new youth-oriented communications and programming will be a metric of success.

Data to be collected:
From each youth, we aim to have a full name, complete mailing address, valid email address and current telephone number and to know in what way they have interacted with CRC. Annual digital surveys will be sent to all contacts coded as youth to collect the following additional information:
● Age group (0-5, 6-10, 11-14, 15-18),
● River-related interests,
● Geographic location,
● School affiliation, and
● Programming preferences.

We aim to match youth contact data to existing contact and donor profiles within our system. We also aim to match youth data on school affiliations with existing engagement data within our system, to track teachers, parents and other youth contacts.
From each youth-oriented event registration, we aim to track among the registered participants the following metrics of diversity and inclusion, who:

- Has requested/communicated a need for accommodations
- Has requested/communicated a need for materials in languages other than English

Evaluation of success:

1 year - We will compare the number of new youth contacts with the data from the previous years to evaluate for increase/decrease and trends in location, age group and school affiliation. We aim for a 25% increase in youth contacts and a 50% response rate to data collection surveys. We will compare the number of youth contacts matching existing contacts within the database to gauge observed new reach. We will evaluate the data collected from each youth to evaluate for completeness and information sufficient to engage in meaningful communications. We will track response to segmented communication in terms of email opens/clicks and successful solicitations.

3 years - We will compare the numbers of youth contacts falling in to each of the defined age groups - 0-5, 6-10, 11-14, 15-18 - and evaluate responses to the mailed communication. We aim for a 50% increase in number of youth contacts, and 75% response to data collection surveys. We will evaluate the number of youth contacts generated, and participation in, youth-oriented programming in each event offered. We aim for We will evaluate the response and data collected by the digital surveys sent to youth contacts, and compare them to response rates and data received from the year before. We will evaluate staff and youth participation in and use of interactive activities at CRC events. We aim to observe youth participation and/or engagement through youth-oriented programming at 40% of CRC’s annual events.

5 years - We will evaluate the numbers and geographic reach of participants in the multilingual youth programming and certification, with specific analysis towards languages preferred, age group trends and responses from youth contact households to association communications. We will compare youth participants of certification program and household data to engagement and participation in other programmatic areas within CRC and response rates to future segmented solicitations. We aim for a 25% response rate to youth household solicitations, and a 50% conversion from youth contacts to CRC volunteers and/or other event attendees.

IV. Abutters

Define this group: All individual landowners, residents, and businesses who directly abut the mainstem Connecticut river or its tributaries. See below categories.

Why is this group of interest: Abutters are natural stakeholders in the river’s health and stewardship. Among them are the prospects for restoration projects, volunteers, contributing
members, major donors and the broader communities that the watershed has to date underserved and under-engaged.

By Businesses
Business owners (and customers/clients) that have a vested interest in the river

- Marinas
- Restaurants
- Campgrounds
- Recreation Purveyors (fishing stores; outfitters)
- Employers/Employee Groups

By Residences (Primary & Second Homes)
Virtuous has partial lists of abutters including for the Old Saybrook-Essex-Old Lyme, CT Lower River area and for Hanover-Norwich-Lyme in the NH-VT Upper Valley. These lists largely represent Major Donor Prospects and people of cultural/community influence.

- For 2021-2026, we should develop and execute a plan to collect riverfront property owners and those on known exclusive streets in proximity to rivers, coves, and waterways.
- Tools available include several useful online resources:
  - Town Tax maps (for example: Lyme, CT)
  - Voter registries
  - Whitepages.com
  - [https://www.beenverified.com/property](https://www.beenverified.com/property)
  - Federal Election Commission’s “Advance Transaction Query by Individual Contributor” to view political contributors. You can search by name, city, state and ZIP code to generate a list of contributors to local political committees.
  - Real Estate web sites: Trulia.com/Zillow.com

By Neighborhood
While the abutter strategy above will improve the prospect numbers for donors and include prospects for a major donor path, CRC must also begin to reach under-represented populations. Many people in river communities have not been included nor well represented in the CRC’s service given the organization’s concepts to-date for stakeholders and members.

Among the under-represented and non-traditional populations, we will find people with environmental &/or river interests already, and those not yet “environmental” and unaware of how a healthier watershed can include a healthier and more vibrant place to live, for raising a family, and for making a living. Many of these neighborhoods have to date been neglected in terms of showing how river stewardship and restoration can be an asset to them as individuals and as communities. CRC must become deliberate and proactive in reaching and in serving these under-represented populations.
The DEI demographics can be defined differently, but for the purposes of “Neighborhood” outreach and inclusion, we’re describing the as yet under-engaged, under-represented, and under-served non-white, urban, and low-income neighborhoods (and downtowns) in the watershed, especially along the main stem. Areas include: Upper River towns like St. Johnsbury, VT; Claremont, NH; Springfield, VT; Holyoke; Massachusetts cities like: Hadley, South Hadley, Holyoke, Chicopee; Springfield, West Springfield; and Connecticut neighborhoods including North Hartford, Sheldon/Charter Oak area of Hartford; East Hartford; and Middletown.

Action steps to take:
1 year - Identify 2-3 priority new abutter data categories from the above lists. Develop content for an introductory mailing to these new lists that provides information specifically relevant to abutters and identifies the variety of ways that CRC can help them. Include a reply device to encourage people to respond with their communication preferences and enter those in Virtuous. Identify ways to message geographically specific and relevant parts of CRC’s work and resources to this list and integrate these messages into a year-long communications strategy to be implemented by year 2 and continued into the future. Working with a list broker, implement a 10,000+ size abutter acquisition mailing targeted by region and by interest area, to encourage people along the river to join as donors.

3 years - Continue collecting entering and coding abutter data, prioritizing via above categories, sending introductory mailing to those lists and integrating them into our communications strategy as above. By the end of three years, have a comprehensive list of all abutters in the watershed and Have messaging and communications strategies for a wide range of abutters categories, and have a personal stewardship plan in place for this group.

5 years - Implement an ongoing data upkeep plan with volunteer support to ensure we can make changes as people/institutions move to and from the river. Have a stream of all CRC communications that speaks to the particular needs of abutters and their concerns, including elements of our email communications, social media, traditional media and mailed pieces.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:

Metrics of success:
• 500+ new abutter records to our database each year, reached out to via mail, and contact preferences recorded.
  o Clear ongoing communications strategy implemented that provides them with specific and relevant materials tailored to their geography and category of institution, community demographics, etc.
  o More abutters joining CRC as contributing members, volunteers, event attendees, etc.
• Increases in response rates, click rates to emails, social media posts, etc. from this group.

Data to be collected:
• Number of records added, coded and categorized as abutters
• Number of these records that engage in the following ways with CRC:
  o Open our emails
  o Come to our events
  o Volunteer
  o Donate
  o Engage on social media

Evaluation of success:

1 year - Aim to add 500 new abutter records, contact them via mail, and set up coding and system to collect their communications preferences and provide targeted communication and personal follow up throughout the year.

3 years - Aim to have added 2,500 new abutter records, contact them via mail, and continue ongoing communications and personal follow up.

5 years - Aim to have added all abutter data available in the watershed, continue above strategies. Abutters (across a wide range of geography, organization/individual type, urban/rural setting) are a vibrant and important constituency within CRC. They become a much more significant part of our active community membership and donor base.

VI. River User Groups

Connecticut River Paddlers’ Trail Users

Define this group: Any person who has signed up for information with CRPT, including people who signed up for the CRPT email list, registered to use a campsite, or donated to the Paddlers’ Trail. Some of these data are already in CRC’s system, and some are being moved into our system as we implement the administration of CRPT’s new fiscal sponsor arrangement with CRC.
Why is this group of interest: Source to Sea and experienced river paddlers are a core constituency for CRC, and we already know that they make up a chunk of our existing network and donor base. That said, with the closer relationship between CRPT and CRC, and the increased use of the river during the pandemic, we are seeing an increase in activity and growth of this group. It’s critical that we continue to connect with them in the coming years.

Also, the launch of the new Boating Guide App offers a huge opportunity for marketing and PR around the Trail, including harvesting of new contacts through app users and re-engagement of existing contacts digitally and by mail.

Within 1 year – Work with CRPT to help them better engage with their network, including helping to create a year-round digital communications and engagement strategy that invites CRPT list participation in CRC events and activities where appropriate. Set up all back end systems to maintain their data. Determine with CRPT leadership the extent to which CRC can directly communicate with and solicit this group. (An agreement this past year allowed for direct solicitation of the CRPT list by CRC, but that is not an ongoing arrangement.)

Within 3 years – Ongoing collaborative communications and engagement strategy in place for CRPT users, including a system for harvesting/following up with app users. Comprehensive solicitation strategy is in place that encourages CRPT list members to join as CRC donors and donate to CRPT.

Within 5 years – The CRPT/CRC collaboration is a well-oiled machine with thousands more people using the app and the Trail. People travel from across the region to paddle the Trail. There is ongoing integration of messaging around river recreation and river conservation. Every person who uses the Trail is engaged with both around future recreational use and opportunities AND the need to support CRC’s river work.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:

- Number of CRPT existing and new contacts.
- Number of targeted digital communications going out to this list.
- CRPT contacts’ engagement with CRPT communications and CRC events and activities.
- Number of CRPT contacts who donate to CRPT and/or CRC.

Metrics of success:

- An increase in the number of Trail and app users
- An increase in the rate at which these users join CRC as donors.

Data to be collected:

From each CRPT user we aim to have a full name, complete mailing address, valid email address and current telephone number, and to know how they joined the list. We also aim to collect information on their preferred method of communication and interest in any other CRC
program areas. We aim to match CRPT registrations to existing donor profiles within our system.

Evaluation of success:

**1 year** - We will compare the number of CRPT users with the data from the previous years to evaluate for increase/decrease and trends in location, etc. We will evaluate the data collected from each user to evaluate for completeness and information sufficient to engage in meaningful communications. We will track response to segmented communication in terms of email opens/clicks and successful solicitations.

**3 years** - We will aim to have 20% increase in CRPT user data overall. We aim to increase the number of engagement opportunities targeting this group and introduce no less than 2 new events targeting them. We aim to observe a 50% retention year on year for people using the trail, and a 25% conversion rate from Trail users to CRC donors of any amount.

**5 years** - We will aim to have a 50% increase in CRPT users overall, a 75% retention rate among returning Trail users, and a 50% conversion rate from users to CRC donors of any amount.

**Anglers and Fishing Community**

*Define this group:* This group includes anglers (trout and shad), the bass fishing community, and any other groups that fish the river or tributaries. We will identify this interest within our existing list, as well as explore list rentals or fishing license data as ways to expand our list. Presence at fishing-oriented groups (Trout Unlimited chapters, etc.) fishing tournaments and events will be another way to harvest contacts.

*Why is this group of interest:* Anglers and the fishing community are a core constituency for CRC, and we already know that they make up some of our existing network and donor base. This community is also well-organized through existing networks and has its own communications structures (organizational and interest publications, email and social media.) If we speak to them in a way that is compelling and relevant, we believe this could be a huge area of growth for our network and donor base.

*Within 1 year* – Work to implement a system for coding fishing interest in our database and ensure that we begin identifying this interest and marking it when we know of it. Engage with Trout Unlimited chapters and members, through group meetings and events as well as individual relationships, asking them to join as CRC donors and volunteers. Focusing on Vermont and New Hampshire, identify key bass fishing tournaments and attend with a table, information about CRC, and a way for people to digitally sign up for our email list or donate.

*Within 3 years* – Ongoing communications and engagement strategy in place for the fishing interest people in our database, including pointing them to existing fishing-related resources.
and creating new ones. Full implementation of a system for ongoing identification of this interest area within our network. Implement new contact harvesting strategy through either list rental or fishing license data and begin ongoing acquisition mailings to those lists. Ongoing presence at fishing-related events on the river. Comprehensive solicitation strategy is in place that encourages fishing community members to join as CRC donors.

Within 5 years – The whole fishing community that engages in the watershed knows about CRC, views it as a positive partner in encouraging better fishing conditions and river health, and engages regularly with CRC as volunteers and donors.

CRC Performance metrics:

CRC’s performance will be evaluated on the following metrics annually:

- Number of fishing community existing and new contacts.
- Number of targeted digital communications going out to this list.
- Fishing community contacts’ engagement with CRC events and activities.
- Number of fishing community contacts who donate to CRC.

Metrics of success:

- An increase in the number of fishing community members who interact with CRC.
- An increase in the rate at which these community members join CRC as donors.

Data to be collected:
From each person we aim to have a full name, complete mailing address, valid email address and current telephone number, and to know how they joined the list. We also aim to collect information on their preferred method of communication and specific interest within the fishing community (where/how do they fish?) We aim to match fishing community members to existing donor profiles within our system.

Evaluation of success:

1 year - We will compare the number of fishing community members in our system with the data from the previous years to evaluate for increase/decrease and trends in location, etc. We will evaluate the data collected from each person to evaluate for completeness and information sufficient to engage in meaningful communications. We will track response to segmented communication in terms of email opens/clicks and successful solicitations.

3 years - We will aim to have 20% increase in fishing community data overall. We aim to increase the number of engagement opportunities targeting this group and introduce no less than 2 new events targeting them. We aim to observe a 50% retention year on year and a 25% conversion rate to CRC donors of any amount.

5 years - We will aim to have a 50% increase in fishing community data overall, a 75% retention rate, and a 50% conversion rate to CRC donors of any amount.
Community Members into Donors Growth Strategies

In looking at which of our existing non-donor community members have been most likely to join as donors in recent years, we see that volunteering, events, and online engagement have all been key factors. Personal connections continue to be important avenues into the organization, but larger scale growth will rely on easy ways for people who come into contact with us to make their first gift.

To that end, and with the extra advantage of a new software that integrates directly with our giving pages, we will implement the following strategies in the coming years:

**Expand the number of opportunities for an initial first gift**, including:

- Continuing and expanding the practice of asking for a gift when someone registers for an event.
- Expanding the option to donate when you make a River Shop purchase.
- Exploring ways to build on year-round engagement and stewardship of Source to Sea volunteers by incorporating asks at the right times using new tools like text giving, and targeted and thankful follow up via email, social media, etc.
- Considering asking for a gift at the time that people access high use tools on our site like the Is it Clean site, the Paddlers’ Trail app, etc.
- Implementing email welcome series’ and workflows that include opportunities to donate a small amount at key times throughout the series.
- Working with affiliate groups to implement their own fundraising strategies.
• Encouraging peer-to-peer giving opportunities and social media engagement that asks for gifts

Tailor existing major appeal acquisition solicitations (as we plan to with broader communications) to particular groups, with specific asks that are relevant to their interests and needs. Fine tune our segmentation where we can, to make our asks more specific.

**Expanded Donor Stewardship and Retention Actions**

We will continue efforts to improve our retention rates alongside our expansion efforts. Every effort will be made to connect personally and meaningfully with our donors, provide relevant programming and services, and inform them of the impact of their gifts. There are three key groups of donors we plan to focus on stewarding within our donor base.

**I. New Donors**

*Within 1 year-*
- Assign new donor to designee - staff person, trustee.
- Thank-you phone call within a week.
- Mail information packet and welcome letter. (Colleen rework letter)
- Make personal phone call. Ask if any questions, explain that their opinions matter, make them feel seen and valued.
- Share a social media post or news article.
- Personal email from assignee – encourage volunteering, give link to volunteer page
- Invite to meet at upcoming event and give link to event calendar.

*Within 3 years-*
- Mail Calendar of Events Card (with refrigerator magnet.) Try a new donor survey.
- Call to invite to an already scheduled tour. (use promotion code free to new donors)
- Feature a new donor in newsletter with picture and short bio.
- Create an auto-responder series with Virtuous. Each email could focus on a different aspect of the organization
- Send photographs and postcards.

*Within 5 years-*
- Set up a forum or other social media platform for donors only. Word press blog.
- Set up a new page on website for new donors only.
- Allow new donors access to our library.
II. Monthly Donors

- Online confirmation page and receipt reassure donors that their monthly gift was successfully scheduled, offer information on how to update/cancel if needed.
- Sending a warm, timely thank you letter.
- Incorporate monthly donor recognition into newsletter, website, e-news, etc.

Within 3 years -

- Create an email series specifically for monthly donors, that provides inside info, advance notice of events and volunteer opportunities
- Enable and encourage social sharing by giving them the tools. Giving is social by nature. Make it easy for our donors to spread our message.
- Put in place a monitoring system or quality control process, so we can spot check that monthly donors are thanked on time and often.

Within 5 years –

- Monthly donors are a recognized and well-understood part of CRC’s community.
- They receive targeted ongoing communications and acknowledgments.
- Monthly donors are 30% of CRC’s overall donor base.

III. Loyal Donors

Loyal donors are defined as those donors that have 5 or more years of giving history to CRC.

Within 1 year-

- Set up a system to identify and track loyal donors in our database.
- Recognize loyal donors in our newsletter donor profiles.

Within 3 years -

- Invite loyal donors to come and see their donations in action.
- Recognize continuous yearly donors in annual report 5, 10, 20 yrs
- Mention how many years they have been giving and let them know how much their continued support is appreciated
- Customize, listen to donor, show them that we know them and give them what they want.
- Establish a “Loyalty Society” which recognizes all donors in this category.
- Adapt outreach from list above.

Within 5 years -

- The value CRC places on long-time donors is well-known.
- The Loyalty Society is an established part of CRC’s communications.
- Loyal donors feel appreciated and are continuing/increasing their support.
- Loyal donors are including CRC in their estate plans.
Appendix I
Non-Donation Membership Data Analysis
Non-Donation Based Data Analysis
Recommendations for Enhanced Engagement with Existing CRC Contacts

Non-Donor Records BY THE NUMBERS

17,544 Records with Total Overall Giving $0
1/1/2009-12/31/2020

- 2,435 Invited
- 2,148 Attended
- 1,458 by Assignment
- 3,103 by Group
- 4,142 Notes in GiftWorks
- 6,056 Never Mailed

Event Record in GiftWorks
Volunteer Record in GiftWorks
What can we INFER from this data?

- We have THOUSANDS of contacts in our system that have engaged with CRC as volunteers and event attendees that have not donated any money = Our community is wider than our donor base.

- We are interacting with a FRACTION of the contacts in our system that fall outside our recent donor base.

- From our data, we are able to identify high volume pathways from which we are already obtaining new contacts.

- By applying strategy to the high volume pathway individuals to increase engagement – both donation- and non-donation-based – We can make better use of our existing contact pool and position CRC to greatly expand our network.
Non-Donor Records by SOURCE Data

- The most consistent and high volume vehicles for new contacts are:
  - S2S
  - CRC’s Website
  - CRC Events
  - Referrals from CRC Staff, Board members, Associates

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<th>Event</th>
<th>Existing CRC contact</th>
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TOTAL 36 769 1987 5 4333 2977 5 11787 726 2772 85 10 1015

S2S includes data sources:

- S2S Sponsorship
- S2S
- 2019 S2S
- 2018 S2S Sponsor
- 2018 S2S
- 2017 S2S
- 2016 S2S Cleanup
- 2016 S2S
- 2015 S2S
- 2014 S2S
- 2013 S2S
- 2012 S2S
Recommendations for S2S Engagement

- Hire S2S Community Engagement Coordinator/Intern/AmeriCorps
- Cleanup Day = Online Giving Day = Text2Give Campaign
- Targeted ask for volunteerism in Spring following participation
- Streamline digital registration process for enhanced data capture
- Monthly S2S-specific communication highlighting: a clean up group, a clean up site, a CRC trash-related victory, a memory of prior cleanup, litter facts, litter’s impact on rivers facts
- Regional S2S volunteer meet-ups for CWC/TT’s, First Day Hike, Trash Scouting

Website includes data sources:

- Website - Volunteer Sign-up
- Website - Member Updates Sign-up
- Website - Action Alert Sign-Up
- Website
- Constant Contact
Recommendations for Website Engagement

- Accessibility audit implementation in FULL
- Reorganize content to reflect current staffing, programming and capacity for public engagement through web channels
- Revised content with sections for specific user groups
- Removal of outdated information and programming
- Install permanent user-led surveys to capture minimal data on interests
- Add interactive elements to engage new user groups: short videos, animations, games, etc.

Events includes data sources:

- Workshop/Recreation Event/Volunteer Activity
- Volunteer Activity
- Tabling Event
- Staff Presentation
- Special Event
- Public Hearing
- Norwich Dam Event
- MA & Alan Swedlund (house party invitee)
- Cultivation Event
- Chickley River legal action
- 2018 Trash Talk
- 2018 Annual Celebration
- 2017 5x5 Journey

- 2017 Oct. Rivermead Retirement Community
- 2017 CRC Launch Event
- 2017 Annual Celebration
- 2016 River Celebration
- 2016 Open House
- 2016 Green River Fest
- 2015 Open House
- 2015 Lyme House Party
- 2015 Annual Celebration
- 2014 Quechee House Party

- 2014 Open House
- 2014 Green River Festival
- 2014 Concert-VT
- 2014 Concert-MA
- 2014 Concert-CT
- 2014 Concert
- 2014 Annual Celebration
- 2013 Open House
- 2013 Concert
- 2013 Annual Meeting
- 2012 Concert
- 2010 Living Along the River Concert
- 2008 Songwriting Contest Attendees
Recommendations for Events Engagement

- Construct uniform materials, approach and staff training for CRC presence at events
- Construct uniform materials, approach and staff training for uniform data capture at all CRC events, scalable to multiple data collection methods to suit event details
- Align events focus and existing CRC work to provide concrete and meaningful take-home actions and activities for event attendees
- Expand events to include more diverse audiences, and offer more equitable and accessible options
- Regular evaluation of guest experiences and course correction of events to address reported barriers to (repeat) participation

Referrals includes data sources:

- Tony Judge
- Tim Keeney
- Referred to us
- Marty Banak
- Kate Putnam
- Humphrey Tyler
- Hooker Talcott
- FERC List-Donlon
- FERC List-Deen
- CRC Staff - Urffer
- CRC Staff - Talbot
- CRC Staff - Rhodes
- CRC Staff - Morrison
- CRC Staff - Morgan
- CRC Staff - Link
- CRC Staff - Lennard
- CRC Staff - Kurtz
- CRC Staff - Griswold
- CRC Staff - Gillette
- CRC Staff - Fisk
- CRC Staff - Donlon
- CRC Staff - Deen
- CRC Staff - Chaffee
- CRC Staff - Bent
- CRC Staff
- Cori Packer
- Board and member referrals
- Barbara Skuly
- Ayla Skorupa
- Arianna Grindrod
- Annette Spaulding
- Alan Spier
Recommendations for Referrals Engagement

- Customized Welcome Mailing and Communication Series for friends of our friends & staff
- Priority registration offerings for personal referrals to staff-led events and presentations

Non-Donor Records ENGAGEMENT MAILING TEST POTENTIAL

![Bar chart showing last mailing received and potential for test mailing campaigns: Engagement, Acquisitions.](chart.png)
Recommendations for Engagement Mailing Tests

- Identify groupings within the data from which to send test mailings and track records for engagement responses.

- Mailing/emailing tests could include:
  - CRC informational mailing/emailing to orient new contacts to the work our organization is doing now, and has done. Add contacts to newsletter mailing lists and solicitations.
  - Targeted ask for engagement (volunteering, event attendance) based on groupings.
  - Construct survey instrument to send by mail/email asking if contact would like to continue to hear from us and how.

- Evaluate physical mailing and email delivery for responses and continued engagement.
Appendix II
Distinct Donor Data Analysis
Distinct Donor Analysis
Lost and Repeat Donors >$100
For Calendar Years 2018 and 2019

Donors with 2018 Total Overall Giving <$100 – Lost v. Repeat as 2019 Donors

262
Lost 2018 Donors

302
Repeat 2018 Donors
Lost 2018 Donors >$100 BY THE NUMBERS

- **262** Lost 2018 Donors
- **99** Attended an Event (26 attended an event in 2019)
- **242** Mailed to in 2019 & 2020
- **166** First Overall Gift Date before 2018 (63% loss of loyal donors)
- **8** Donated in 2020

Lost Donors by 2018 Giving – GROUP DATA TRENDS

- Total Lost 2018 Donors by Source
  - Donation: 67
  - None Specified: 53
  - Event: 35
  - Referral: 33
  - S2S: 16
  - Outside List: 15
  - Website: 12
  - Purchase: 11
  - Engagement Campaign: 11
  - Research: 7
  - Unknown: 1
  - Self-referral: 1

Total Donors
Lost Donors by 2018 Giving – SOURCE TRENDS

Total Lost 2018 Donors by Source

- Donation: 67
- None Specified: 53
- Event: 35
- Referral: 33
- S2S: 16
- Outside List: 15
- Website: 12
- Purchase: 11
- Engagement Campaign: 11
- Research: 7
- Unknown: 1
- Self-referral: 1

Repeat 2018 Donors >$100 BY THE NUMBERS

- 95 Attended an Event (26 attended an event in 2019)
- 302 Mailed to in 2019 & 2020
- 254 First Overall Gift Date before 2018 (84% retention of loyal donors)
- 11 Donated in 2020