

# STELLAR Fundraising Investor Relations and Retention Outline with Special Involvement Section



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The attached contains the STELLAR Investor Relations & Retention Plan which was developed by STELLAR Founder and CEO, Terry Cusack, after having spent years at the Jacksonville, FL Chamber working with delinquent membership accounts and from conducting thousands of STELLAR Feasibility Study Interviews. In essence, what he learned from those thousands of phone calls and interviews wasn't rocket science, nor was it even a historic discovery. What he learned was *active member investors remain active member investors!* Said another way, *if they are in on it, and up on it, they won't be down on it* (and thus not pay their dues or pledge)!

This Investor Relations & Retention Plan is designed to take a proactive role with engaging and informing member investors via various involvement opportunities and through multiple communiqués delivered by our client Org., in an effort to retain 95%, or more of their member program investors. This document also includes a host of other resources and association info for our clients to consult and consider involvement. We trust this is helpful. The STELLAR Team.

**INVESTOR RELATIONS AND RETENTION: ESPECIALLY  
PREPARED FOR STELLAR CLIENTS BY TERRY J. CUSACK,  
FOUNDER AND CEO, STELLAR FUNDRAISING EXECUTIVES,  
INC.**

Keeping your investors informed and confident that their money is being used wisely and effectively is vitally important to the ongoing success of the program and to minimize pledge defaults. The following counsel is offered as a means to implementing good investor relations throughout the multi-year program cycle:

1. Establish a definite multi-year budget for investor relations.
2. Make investor relations a specific assignment for a key staff member, or outsource it and prepare a plan through efforts by a special team of staff, consultant(s) and/or appropriate volunteers.
3. Provide a special investors newsletter (or insert in the Chamber newsletters/Business Journal or with website links in various locations, i.e. Chamber, Newspaper, Business Journal, etc.), and to be mailed to investors quarterly, at a minimum. However, it need not be on a specific date, but sent out immediately when news of importance develops. Or quarterly, with “News Flashes” as they occur, to subsidize this outreach vehicle.
4. An initial investor’s report should go out to update everyone when the campaign goal is reached. This could be the final edition of the “Campaign Update.”
5. A Wrap-Up Report on the campaign should be sent after all follow-up procedures are concluded and a “final-final” campaign pledge total can be reported. (Sent to either the entire campaign database, or better, the entire Chamber membership, elected officials, all turn downs and of course, all the pending accounts lists, combined.
6. It must be made clear to investors, and the public, the positive role the Chamber now plays in ED (in conjunction with its partners) in driving sustainable growth. Further, the Chamber will have a significant economic and work force impact on the region as well.
7. Consistently seek opportunities to treat program investors in “special VIP” ways. Invite them to ground breakings (or roll-out of new branding materials, etc.) and grand openings and give them opportunities to meet those involved with the both the business coming to town, and the Campaign Leadership Team, which along with other top program investors, should make up the new Campaign Oversight/ED Advisory Board.
8. Publish a thank-you roster of ALL investors in the *Chamber Campaign in the Business Journal or local newspaper and ask others to join the campaign (the search for new investors may continue over the program life cycle)*. Also, consider a full-page ad (in-kind) in local and regional print media. Recognize all investors equally and give importance to large and small investors equally. The ad

should list each organization or individual alphabetically without a dollar amount, or contact person's name.

9. On the anniversary of the program's launch, issue a special commendation or memento of their participation in the program. (Plaque, Golf Balls, Mug, Etc.)
10. Host at least one annual investor meeting each year. All major Chamber events should include a mention of the campaign, and consider having Tom Ralser speak at your annual dinner about your programs successful **ROI Look Back Report**...you should have him due these annually (it's cheaper and easier than doing it every 5 years, as I recall him saying; learn more at his website ([www.ROIMetrix.com](http://www.ROIMetrix.com)), avoid the temptation to let this take the place of an annual investors meeting.
11. Again, use your campaign investor list as a VIP roster. Invite investors to special functions and, if possible, let them know they are being invited because of their special status.
12. Prepare an annual Investor Directory listing all investors and send to all who participated, AND, let them know that the Chamber will be "placing this Directory in the hands of business leaders moving to town." Suggest that they are always welcome to provide input and that "This Directory is a who's who list that should sit on their desk." (Make available in CD for downloading into hand-held devices and sales software such as ACT!
13. Keep the names and faces of campaign and program leaders prominent (in newsletter's and in the Directory) in all literature long after the campaign. Never let the program become identified more with staff than volunteers. (Remind new staff that nonprofit 101 teaches us to keep your volunteers between you and your project and out front and visible!) I'm amazed at how many Chamber CEO's I see on TV or read about in the paper...where is your Chairman!?
14. Involving investors in special assignments like planning new strategies (for the next program cycle; to maintain focus, "we cannot take on any new programs beyond those which were tested and funded by the campaign." As you launch your new programs keep them (volunteers) active and "plugged-in" as it helps to retain them. As does having them hosting prospects "confidentially!"
15. When invoicing investors for pledge payments, always include a "hand" note from the campaign chair(s) or at least the Chamber CEO, expressing your thanks, gratitude and mention a few recent positive developments, including copies of clippings from the newspaper. (Can be a separate attachment, or Ralser's ROI work.)
16. Consider holding monthly chairman(s) breakfast's and invite 20 investors at a time to "meet the Chairman, learn "what we're up to, and so you can give us your feedback." Any that don't show after three invites, the CEO or the Chair needs to go see this person and make them feel special, and very much needed.
17. Solid Investor Relations & Retention takes money (so budget for it!) and planning and scheduling. STELLAR has developed the attached to help you map out your plan. Only STELLAR provides this service (that we are aware of). However, our

statistical analysis shows, if you'll do the above, you should expect to retain 95% or more of all pledges (excluding small telemarketing pledges as they, like chamber membership's, drop out at a rate of 50% in year two. REMEMBER THIS: Major Investors have gone "above and beyond" for the Chamber, so give them ALL "the care and feeding" (and special attention) they most certainly deserve, and likely want.

**Additional resources for additional Board creation, structure, development and other ED ideas and educational opportunities we suggest, beyond ACCE, include:**

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Book Credits:

**Who Moved My Smokestack & The Little Black Book of ED**

Article: [http://www.stellarfundraising.com/newsletters/september\\_2007.html](http://www.stellarfundraising.com/newsletters/september_2007.html)

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Jeff Finkle, Pres. IEDC:

[jfinkle@iedconline.org](mailto:jfinkle@iedconline.org)

(202) 223-7800

Web site: <http://www.iedconline.org/>

See the "IEDC Resource Center" link half way down on the left side on their homepage.

If the Chamber is not a member, your absolutely should be. Let me know and I'll have someone contact you.

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MAEDC (Mid-American EDC), good and getting better every year.

<http://www.maedc.net/>

Mid America Economic Development Council

17 South High Street, Suite 200 Columbus, OH 43215

Phone: (866) 439-9172 / Fax: (614) 221-1989

email: [tracey@assnoffices.com](mailto:tracey@assnoffices.com)

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The Illinois Development Counsel,

<http://www.ildevelopmentcouncil.org/>

Michael R. Lane, MA, Executive Director

[mike@ildevelopmentcouncil.org](mailto:mike@ildevelopmentcouncil.org)

Professional Association Management Services, Inc. (PAMS)

225 E Cook St. Springfield, IL 62704

Phone: (217) 528-5230 ext. 2 / Fax: (217) 241-4683

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This last one is going to surprise you a bit; it's the Southern Economic Development Council. The SEDC is probably the second largest ED Assoc. in the US and stretches from Florida to

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Texas - Kansas to West Virginia. Truth be told, the South has been doing a much better job with recruitment than any other Region in the Country. So why not go learn from, and be around, your best and most successful peers to gain a fresh perspective!?

<http://www.sedc.org/>

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