
Year-End Giving:

Reach the Next Level in Fundraising Results

October 12, 2022

@thealfordgroup



Land Acknowledgment Chicago, IL

Chicago is located on the traditional unceded homelands of the Council of the Three Fires: the Ojibwe, Odawa and Potawatomi Nations. Many other tribes such as the Miami, Ho-Chunk, Menominee, Sac and Fox also called this area home. The region has long been a center for Indigenous people to gather, trade and maintain kinship ties.



Alford Group



Accelerating impact

Full-service consultancy.
Tailored solutions.

- Fundraising
- Strategic & Organizational Planning
- Governance & Leadership Development
- Interim Staffing
- Data Management, Analytics & Assessment
- Diversity, Equity & Inclusion

Webinar Logistics

- Recording
- Survey
- Listen-only mode
- To ask a question, please use the Q&A function/icon
- Join us on Twitter!

Today's Agenda



Introductions



Ground Rules and Polls



Importance of Year End



How to Have a Stress-Free Year End

Today's Presenters



VICE PRESIDENT

Mary Hackett



CHIEF OPERATING OFFICER

Alexis Cooke

Ground Rules

- Chat us up!
- Participate
- Shut down email
- Register for Alford Group's upcoming webinars:
 - **Strength-Based Messaging** (Nov 1)
How to Accelerate Impact Through Inclusivity
 - **Demystifying Cryptocurrency** (Nov 15)
How It Works and Why It's Important
 - **Capital Campaigns** (Dec 8)
How It Works and Why It's Important

Our Bold Promise

Today, we will discuss:

- ✓ How significant the year-end is in the US
- ✓ How to prepare for year-end
- ✓ Our best tips and tricks for increasing revenue from your efforts
- ✓ How to assess your year-end efforts

Quick Qs

How much of your overall revenue comes in November and December and/or from your year-end efforts?

Answer Options:

- 10-24%
- 25-49%
- 50% or more
- I'm not sure

Quick Qs

What database are you using?

Answer Options:

- Bloomerang
- Raiser's Edge / eTapestry
- Donor Perfect
- Little Green Light
- Salesforce
- Other

Quick Qs

When do you start planning your year-end efforts?

Answer Options:

- During the Spring (before the end of April)
- During the Summer (before the end of August)
- Early Fall (before the end of September)
- I'm starting today!

Quick Qs

Will you manage your year-end with external partners (design, direct response vendor, mail house) or with internal partners only?

Answer Options:

- Yes, I have one or more partners.
- No, completely internal!
- I don't know yet.

The Hustle and Bustle of Year-End

Follow-up appeal to non-responders

Pledge reminders

Year-end appeal segmentation

Online appeals

LYBUNTs & SYBUNTs

Tax letters

Impact / Annual report

Annual board solicitations

Giving Tuesday

Email follow-up to appeals

Personal major gift cultivation, stewardship and solicitation

Quarterly donor newsletter

"Thanksgiving" stewardship

Giving Pages

Direct Mail Appeal

Signature Fall Event



Year-end is B-U-S-Y

Mountains of gifts, but mountains of work too!

Increased:

- ✓ Stewardship visits
- ✓ Mailings
- ✓ Gift entry/processing
- ✓ Acknowledgement letters
- ✓ Thank you calls

Best ♦ Problem ♦ Ever



Importance of Year-End

Charities receive **41%** of their annual contributions in the **last few weeks** of the year!

For **74% of donors** the primary reason for giving at year-end: *“the holidays are a time to be thankful for what you have and give to those who need it.”*

31% of annual giving occurs in **December**

12% of annual giving in the **last three days** of year

60% of nonprofits manage between 1-3 donor “touches” throughout the year-end

***How* to Get Ready for a Stress-Free Year-End**

1. Create a year-end strategy timeline and schedule out internal check-points!
2. Identify engagement opportunities
3. Line up and confirm all internal and external partners and volunteers
4. Prepare and outline all processes for gift entry, acknowledgements, reporting
5. Define audiences and appeal segmentation
6. Align all messaging and communications strategy
7. Design necessary collateral
8. Prepare (and order) material and postage
9. Implement! Manage mail merges, launch website and social media campaigns and activate those relationship building activities!

***How* to Have a Stress-Free Year-End**

Outline Your Strategy: Create and follow your year-end timeline

- Appeals across all channels and stewardship opportunities
- Milestones and goals
- Content, narrative, collateral deadlines
- Confirm all internal and external partners and volunteers

***How* to Have a Stress-Free Year-End**

Gift Entry: Set Yourself Up for Success and Efficiency

- Run AddressFinder or work with your Mail vendor to update any addresses
- Nest all your Campaigns, Funds & Appeals for semi-automated gift entry
- Record appeals on constituent records as they go out

***How* to Have a Stress-Free Year-End**

Acknowledgements: Set Yourself Up for Success and Efficiency

- Review and Update all your Thank You letters, including your online receipts
- Utilize the functionality of your database to generate letters
- Schedule volunteers to help you
- Supply up! Get letterhead, postage, envelopes, and everything else you need

***How* to Have a Stress-Free Year-End**

Stewardship: Set Yourself Up for Success and Efficiency

- Set up queries/reports and provide weekly lists of:
 - First time donors \$250+
 - Donors who reach 5+ years of consecutive giving
 - Significant increases in giving
- Send Tax Letters out in mid-January to those \$250+

***How* to Have a Stress-Free Year-End**

Measuring Results: Set Yourself Up for Success and Efficiency

- Set up queries/reports and get feedback *before* the volume increases
- Figure out your reporting cadence
- Be proactive!
 - On 12/1, pull a list of everyone who gave \$250+ last year but nothing this year
 - Review appeal performances weekly

- 
- # of gifts to each appeal
 - Average gift to each appeal
 - Response rate for each appeal
 - Upgrade and downgrade rates

***How* to Have a Stress-Free Year-End**

Define Audiences and Inform Narrative: By channel, appeal and/or function

- Segmentation is key - at least by average gift size, affinity/supporter type, date of last gift and gift method
- Define and align all messaging and communication outputs with organizational priorities
- Tailor and personalize - by segment
- Don't make things harder than you need to

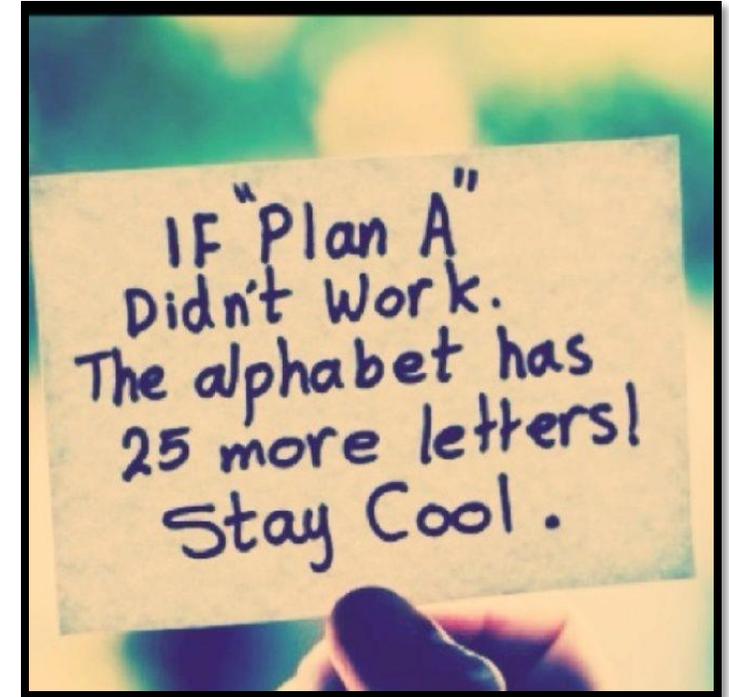
***How* to Have a Stress-Free Year-End**

Stock Up and Staff Up:

- Design and coordinate necessary collateral
- Prepare (and order, if appropriate) material and postage
- Create staffing plan with clearly assigned roles

Pay Attention and React

- Produce and review reports weekly (not Fridays)
- Anticipate and provide other informational sources
- Course-correct if needed
 - ❑ Are my fundraising efforts producing the results I want?
 - ❑ Do I need to produce an additional, special appeal to long-standing donors who have not yet responded?
 - ❑ Have all my \$1,000+ donors from last fiscal year renewed their gifts or do they need calls from the Executive Director or Board Chair?
 - ❑ Have I given my entire donor pool ways to participate in year-end giving?



Assess to Understand What Worked and What Did Not

- In January, sit down and have a postmortem of how year-end went
- Review the data
 - Content matters
- Build your plan for 2023

Appeal	# of Donors Response Rate	Hard Costs	Revenue	ROI	Media n Gift
YE Mailing #1	256 4%	\$2,112	\$28,160	\$13.33	\$110
YE Mailing #2	312 8%	\$1,250	\$42,120	\$33.70	\$135
E-Newsletter	13 2%	-	\$750	-	\$50
12/30 E-mail	21 5%	-	\$7,510	-	\$100
Giving Tuesday	16 1%	\$350	\$250	(\$.71)	\$30
Staff/Board Phone-a-thon	130 10%	\$250	\$50,050	\$200	\$385
Special Mailing to \$500+	86 25%	\$60	\$65,900	\$1,098.33	\$625



Q & A



Fall Webinar Series

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<https://www.alford.com/news-events/>

Thank You!

VISION

A world where possibilities are endless and reflect the best of who we are as humans.

MISSION

We accelerate the nonprofit community's impact and advance social change.

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