



Elevating End-of-Year Giving: #GivingTuesday & Other Strategies for Success

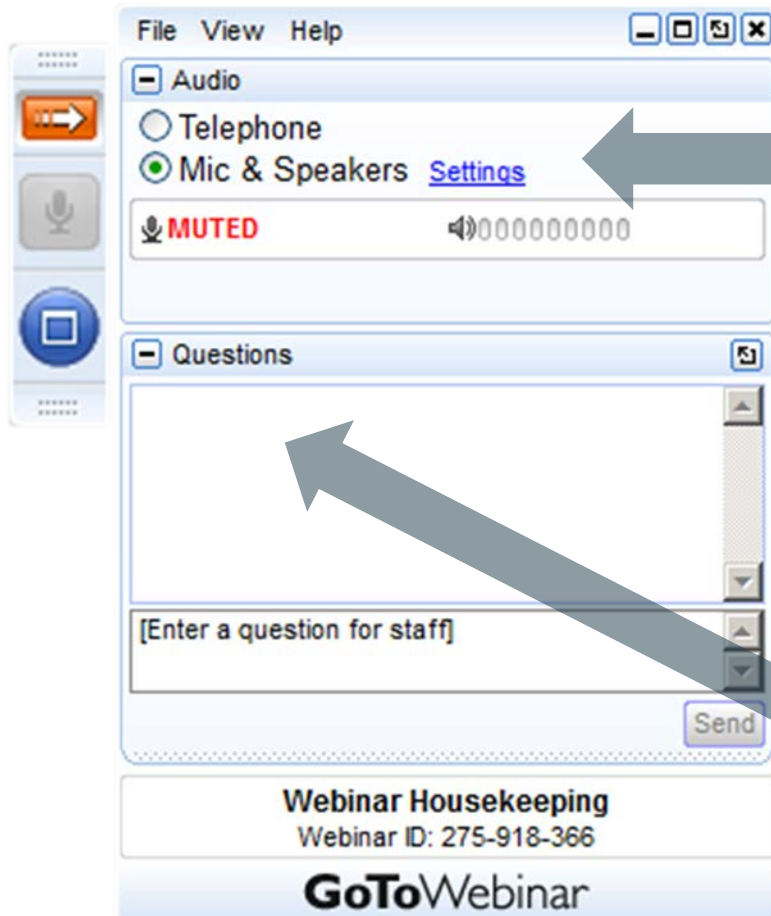
Melissa Rothberg, Vice President • CCS Fundraising

Briana Kerensky, Marketing Manager • See3

July 19, 2017 • 1:00–2:00 PM ET



Logistics



To join audio:

- Choose “Mic & Speakers” to use VoIP and listen through your computer
OR
- Choose “Telephone” and dial using the information provided

Throughout the webinar you can type your questions here for discussion later

About CCS



Leading fundraising consulting and management firm



Worked in 5k cities around the world



Largest and most experienced permanent staff



Varied and flexible client engagements



Clients are among the most recognizable brands in philanthropy nationally and internationally



New York – Chicago
San Francisco – Los Angeles
Baltimore - Washington
St. Louis – Dallas – Seattle
Boston – London – Dublin

About See3

See3 is the digital agency for do-gooders. We equip and empower courageous do-gooders to make the most impact for their cause. Our approach to digital communications prioritizes strategy over tactics, and engages tools such as video and web development for maximum impact.



Our Presenters




Briana Kerensky
Marketing Manager
See3



Melissa Rothberg
Vice President
CCS Fundraising

Session Objectives

Understand the role of year-end fundraising in your overall annual plan.



Establish a successful plan for maximizing year-end fundraising.



Learn how to build and incorporate a #GivingTuesday strategy according to YOUR audience.



Annual Giving: The Bookend to Your Annual Plan

- **31%** of annual giving occurs in December, with **12%** happening in the last three days of the year
- **50%** of organizations receive the majority of their contributions between October and December
- The average person makes **24%** of their annual donations during year-end.

How Do We Maximize the Last Few Months of the Year?

Identify gaps to close to achieve annual goal.

Set specific objectives.

Analyze and segment donors.

Consider how #Giving Tuesday fits into the overall strategy.

Develop targeted messages and strategies for each segment.

Create an activity timeline and appeal calendar.

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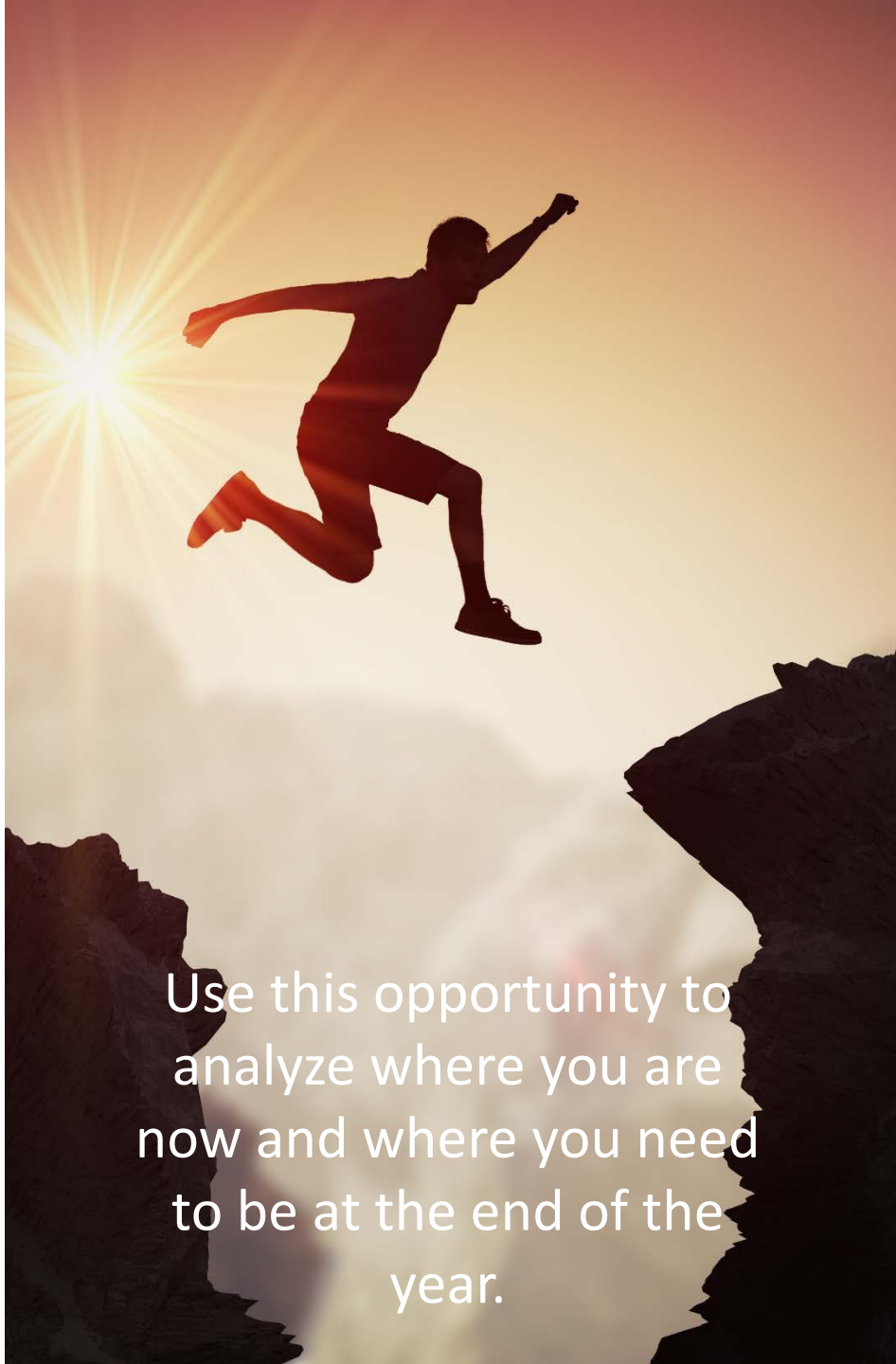
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Develop targeted messages and strategies for each segment.

Create an activity timeline and appeal calendar.

Identify Gaps


- What needs to be done to achieve your annual fundraising goal?
- How have you engaged your donors to date? Are they expecting solicitation?

A silhouette of a person in mid-air, jumping over a gap between two dark rock formations. The background is a bright, hazy sky with a sunburst effect from the sun, which is partially obscured by the rocks. The overall scene conveys a sense of challenge and achievement.

Use this opportunity to analyze where you are now and where you need to be at the end of the year.

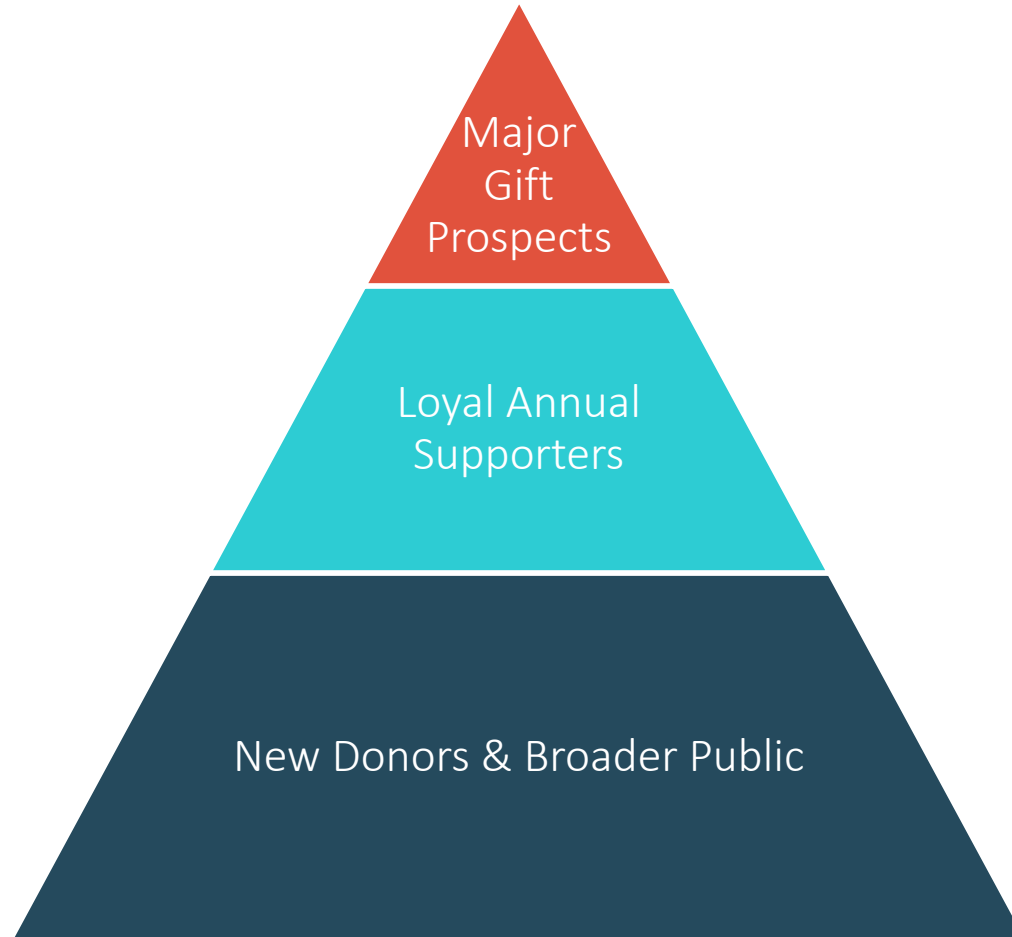
Get Specific

- Increase year-end goal?
- Increase all donors segments?
- Gain new donors?
- Retain donors?
- Increase number of recurring donors only?
- Increase average year-end gift size?



You may have different segments that require tailored targeting, but try to align your efforts toward one larger goal!

Analyze & Segment Donors



#GivingTuesday's Impact End-of-Year Fundraising

\$168M raised

Online gifts grew by **20%**

33% more non-profits received an online donation on #GivingTuesday compared to 2015

\$107 average gift

Black Friday. Cyber Monday.

#GIVINGTUESDAY™

November 29, 2016

\$250M
in 2017?

Sector Performance

2016 DISTRIBUTION OF #GIVINGTUESDAY REVENUE BY SECTOR

SECTOR	2016	2015	2014	2013	2012
Arts & Culture	5%	3%	1%	1%	2%
Environment/Animal Welfare	19%	10%	4%	3%	4%
Faith-based	6%	16%	21%	40%	2%
Healthcare	18%	7%	13%	8%	9%
Higher Education	17%	13%	17%	8%	9%
Human Services	21%	15%	10%	13%	23%
International Affairs	10%	8%	9%	8%	13%
K-12 Education	8%	8%	10%	6%	3%
Medical Research	12%	13%	13%	11%	33%
Public & Society Benefit	8%	6%	3%	2%	2%

Determine Appropriate Targets for #GivingTuesday

- #GivingTuesday (and all fundraising endeavors) is about more than just a basic solicitation.
- Many important considerations factor into your End-of-Year strategy:
 - Who in your audience already gave this year? Who has not?
 - Will your 2017 donors be receptive to a subsequent gift? What's an appropriate amount to ask for, that won't freak them out?
 - What do YOU have that your audience wants? Can you help your audience achieve any goals?

Board and Major Gift Prospects

Board Members

Objectives

- Complete their annual fundraising plan
- 100% participation

Communication & Messaging

- Custom approach/tailored message
- Leverage a match for #GivingTuesday

Major Gift Prospects

Objectives

- Closing strategy, not an ask strategy

Communication & Messaging

- Custom approach/tailored message
- Individual visits with targeted follow-up (start now)



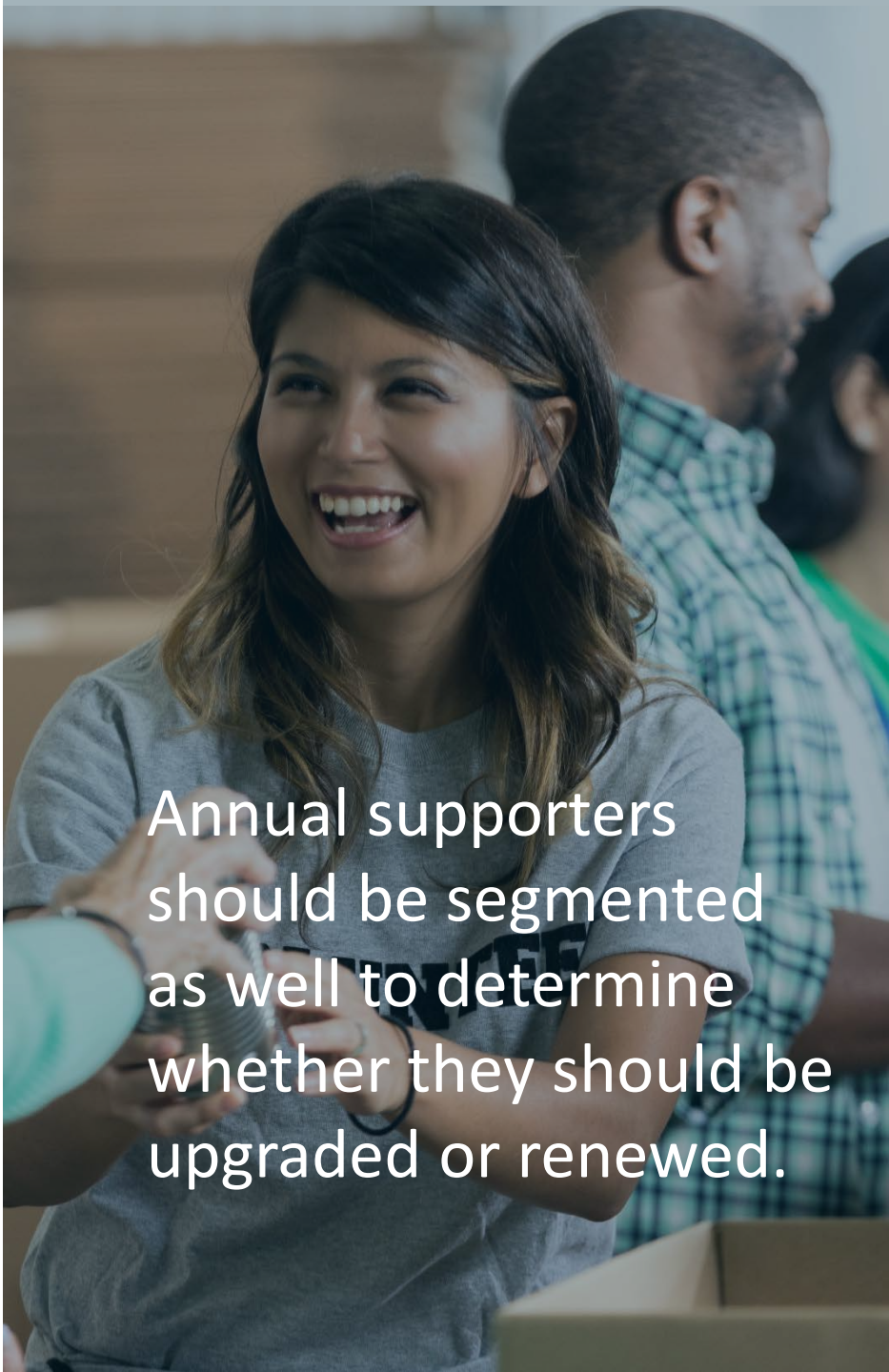
Charitable IRA rollovers can be a great additional giving vehicle for certain donors.

#CAGivingTuesday: Cheshire Academy Leverages Matching Gift



Loyal Annual Supporters – The Traditional Target for Year-End Appeals

- ❖ Renewal
 - ❖ Upgrade
 - ❖ LYBUNTS/SYBUNTS
-
- Use a multi-channel approach
 - Stewardship is an important year-end message

A photograph of a woman with long dark hair, wearing a grey t-shirt, smiling broadly. She is holding a small, round object in her hands. In the background, there are other people, including a man in a plaid shirt, and what appears to be a cardboard box. The image is partially obscured by a semi-transparent dark overlay.

Annual supporters should be segmented as well to determine whether they should be upgraded or renewed.

Engagement Strategy for Loyal Annual Supporters

Methods

- Phone calls
- Personalized mail/email
- Custom message
- #GivingTuesday or National Philanthropy Day

Strategies

- Messages should be interesting, conceptually simple, and easy to read
- Start early
- Make an “irresistible” offer
- Focus on the case
- Be specific with the ask
- Make it as personal as possible
- Make the benefits to giving clear

New Donors / Broader Public

- Appeal to natural constituencies not new constituencies
- Give focus to multi-channel awareness activities
- Identify and utilize connection points
 - Meet donors where they are at
 - Friend-to-friend
 - Holiday parties
 - Volunteer opportunities
- Build on feelings of nostalgia
- Take advantage of national activities in later months
- Good opportunity to test new messaging and branding!



Engagement Strategy – New Donors and the Broader Public

Promoting Your Case

1.

- Concentrate on your homepage

2.

- Place your mission statement in a prominent spot

3.

- Boost donor confidence

4.

- Use stories to show the power of a gift

5.

- Let your contributors speak for you

6.

- Show where the money goes

7.

- Make your donation buttons big and colorful

Make-A-Wish® Supporter Personas

What are Personas?

Audience personas enable us to help people see themselves as the hero of our story. When people see a role for themselves in a story they are likely to be motivated to act.

How do I use them?

Personas are meant to guide storytelling and messaging efforts. Personas capture a snapshot of each target audience they represent, but are not intended to describe all members of that group.



Vanessa, 25

The Young Professional Volunteer Persona



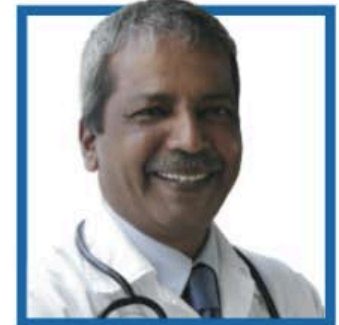
Eddie, 57

The Empty Nest Volunteer Persona



Sarah, 50

The Social Worker Persona



Dinesh, 48

The Doctor Persona



Margaret, 62

The Major Donor Persona



Elizabeth, 46

The Events Donor Persona



Amy, 44

The Annual Donor Persona



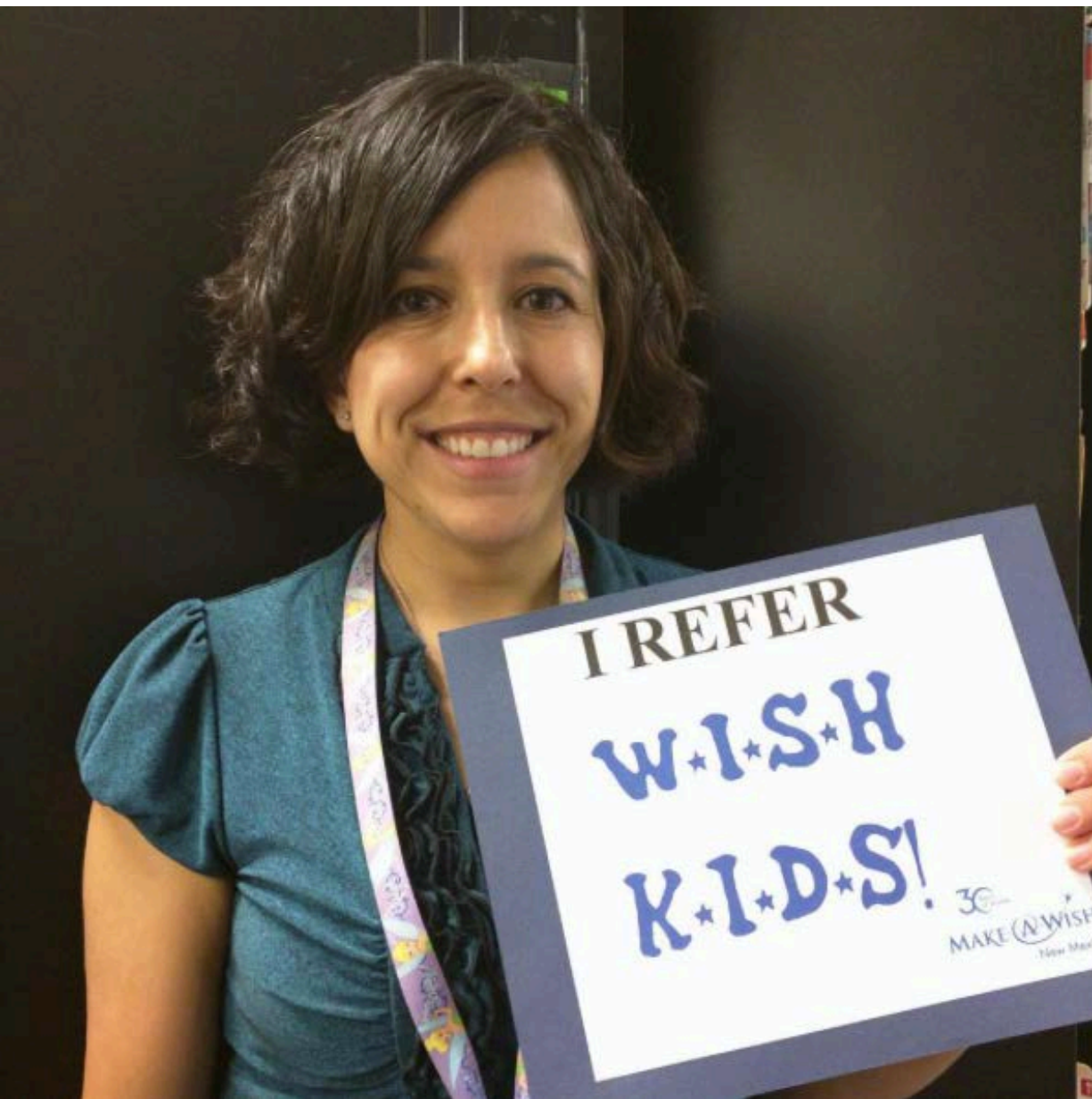
Gina, 42

The Gen X Donor Persona



Manuel, 27

The Millennial Donor Persona



makeawishamerica

Follow

makeawishamerica "As a pediatric oncology counselor, I've referred over 150 kids to Make-A-Wish New Mexico. I asked to be the person who handles referrals because Make-A-Wish enhances the quality of life for our children and our families. The amount of quality wishes I've seen in the past years is overwhelming in a positive way. It brings me hope in my job and provides beauty to what can be a sometimes dark time, too. The fact that I get to be a part, at least a little bit, of a wish is an amazing gift. Make-A-Wish is, by far, the best non-profit to work with. I'll always support Make-A-Wish in some way. I highly encourage you to volunteer. It's a life-changing opportunity you should not pass up. You get to help give hope and support to a child and family in a very scary place.



2,340 likes

JULY 30, 2016

Log in to like or comment.



Overall Messaging

Tell stories

Warm up your audience
with engaging content

Don't surprise them
with a donation ask --
let them know you're
participating in advance

Tell the stories of the
people who advance
your mission – including
donors!

Create an emotional
response in your
audience

Show successful
examples

Be bold and innovate

Introduce Personalized
Video

Need help figuring out
how to be strategically
innovative? See3 offers
workshops!

Timeline

Aug/Sept

- Planning & early implementation
- Board/Major Donors: Submit requests
- Annual/New Supporters: Fall appeals and targeted marketing

October

- Materials finalization & early follow-up
- Board/Major Donors: Secure matching gifts
- Annual/New Supporters: Begin broad-based donor communications

Nov/Dec

- Closing strategies & follow-up
- Board/Major Donors: Closing activities and holiday gatherings
- Annual/New Supporters: Appeals, #GivingTuesday and follow-up activities



Questions

Thank you.

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