



THE TOP 10 THINGS

you should know for a strong year-end campaign

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The most important fundraising season throughout the nonprofit industry is just around the corner. Year-end giving amounts to an estimated 40-70 percent of many nonprofits' annual budgets. The most charitable season of the year is a prime opportunity to secure new supporters and to lift the giving levels of current donors.



Consumers donate an estimated **\$48 billion** during November and December.

A well-planned campaign based on donor-centered fundraising best practices will ensure your organization connects donors' giving priorities with your mission to generate the highest level of revenue possible. This whitepaper will review the steps to devising a strong campaign—including how to use data analytics to target your messaging, the importance of a compelling story, how to distribute your story through multiple channels, and when to follow up with donors.

With early planning and proper execution, this could be your best year-end yet.

TOP 10 STEPS FOR A STRONG YEAR-END CAMPAIGN

1. Start planning early.
2. Evaluate your data.
3. Break down silos.
4. Craft a compelling story.
5. Create catalytic events.
6. Optimize your website.
7. Integrate your communication channels.
8. Do a final email push the last days of the year.
9. Thank your donors.
10. Cultivate for next year.

1. START PLANNING EARLY

Here's an unspoken truth about fundraising: your year-end planning starts in January. The essence of good fundraising is building strong relationships, so what works at year-end works all year long. Telling a compelling story each time you reach out to your donors will keep them inspired and engaged. All the communication done throughout the year should build into that year-end crescendo.

When you craft your strategic communication calendar for the year, consider centering your messaging on an overarching vision, goal, or campaign. Then break that overarching vision into related themes that play out quarterly or monthly and reinforce your campaign mantra. Throughout each month, be sure that the drumbeat to your donors clearly outlines what the vision is, how you are reaching it, and what the impact will be when you achieve the goal. When it comes to year-end plans, this is a critical time to tell your story and its impact all year long.

Case in Point: CitySquare

One of Pursuant's clients, CitySquare, crafted a yearlong strategy centered on their service areas—hunger, health, housing, and hope. Each quarter the messaging focused on one of those “Hs.” For example, when the quarterly theme was hunger, they used a video to communicate the story of a neighbor who received food as part of one of their hunger initiatives, and then connected that piece to the broader story of transforming lives and communities in Dallas.



Early planning and preparation allow you to identify your top goals and the steps to help you reach them, so keep that in mind when the new year rolls around. In the meantime, here's what you should be doing now to build up your campaign prior to November and December.

CAMPAIGN TIMING

September is a good time to craft your end-of-year campaign strategy, including your messaging and communications timeline. The communications you send to donors during September and October should build your case for support and ensure that your supporters know your story well enough that they will be compelled to give when you make more direct asks in November and December.

Action items:

- Create a communications calendar with key dates for each year-end touch point. Be sure to include each opportunity you have to message to your donor – mail, email, social media, events – and list the target audience. Pay attention to who is receiving what types of communication. Segmenting audience and messages here is key.
- Map out the strategy to help you keep an eye on the big picture, as well as the steps involved on each project.

What if my fiscal year ends in June?

You can implement different strategies for a fiscal calendar that doesn't end when year-end giving does. Since giving often dips during the late spring and summer, you can add a special fundraising challenge, such as a matching grant, in the weeks leading up to your fiscal year close. You'll benefit from the lift this gives your donations during the summer, and you can still participate in the traditional holiday giving season and tax-deductible gifts made at the end of the calendar year.

2. EVALUATE YOUR DATA

The strongest fundraising campaigns are based on extensive donor analytics. Knowing who your donors are, their propensity and capacity to give, and their specific interests will inform the strategic decisions of your campaign.

SEGMENT YOUR DONOR GROUPS

The more specific you can be in your asks, the better your results will be. To do that, you'll need to segment your donor groups. Start by looking at data from the past year. Who is new to the house file? Who's giving at which levels? Who gave multiple times last year? Did those donors give to a specific program or area of service?

Ideally, you have a solid database that tracks this kind of donor behavior and staff members who know how to read those behavioral indicators. You can then take that data and craft targeted messaging based on donor personas. Make use of



communications technology to create conditional content that sends specially crafted messaging according to past behavior and donor interests.

Action items:

- Before sending out year-end communications, clean up your contact list of any duplicates or bad addresses.
- Segment the donor file based on past giving, wealth overlays, and behavioral indicators.
- Identify each group's targeted messaging.
- Compile metrics to test campaign results so that you can improve on your efforts each year.

3. BREAK DOWN STRUCTURAL SILOS

Many nonprofits tend to operate in structural silos. The development department is often divided up into levels of the pyramid—general fund, mid-level gifts, major gifts, and planned giving. When it comes to year-end communication, each “silo” should work in concert together, building upon each other's messaging and actively driving donor engagement and involvement with the organization. Communication should be coordinated around a central message with a branded look and feel, so at every level your donors see what you're doing, how their gifts will make an impact, and how they can join the effort.

To have an effectively integrated campaign, we encourage internal teams working together toward the common goal of lifting giving at every level. This typically includes individuals from the executive, marketing, events, web, finance, and fundraising teams. Having this internal buy-in helps not only rally the teams internally towards one goal, but also helps set the tone for the importance of teams working together to achieve an organizational milestone.

Action items:

- Call planning meetings with key stakeholders in the organization including representatives from every sector of your development department, including general/annual fund, mid-level, major gifts, planned giving, marketing, events, web, finance, and your organization's executives.
- Be sure that everyone understands the goals for your campaign and the steps required to reach those goals.
- Ensure that campaign messaging and design is coordinated for every level of the pyramid.

SET MEASURABLE GOALS AS A TEAM.

After your integrated team has formed, it's time to set measurable and meaningful goals that are important cross-departmentally so that you can track the success of your campaign and have a benchmark for future years. Seek input from the stakeholders



and build out a year-end fundraising dashboard. Have one person in charge of compiling the data regularly and then sharing the results to the team often. Be sure to celebrate successes or be flexible to tweak your strategy based on data and what you learn throughout the integrated campaign efforts.

Here are few metrics to consider:

- Number of donors by channel (direct mail, email, social media, text, events, face-to-face visits, etc.) year over year
- Average gift size by channel year over year
- Number of gifts given by channel year over year
- Total dollars raised year over year
- Growth percentage increase in dollars year over year
- Number of new donors acquired year over year
- Number of new email addresses acquired year over year
- Did we increase average gift size year over year?
- Did we increase/decrease the number of communications year over year and what was the effect?

4. CRAFT A COMPELLING STORY

Too many donor communication pieces fail to adequately engage donor passion for the mission. Every time we reach out to donors, we should seek to inspire them by how our work is changing lives. Harnessing donor passion will drive giving long before the latest technology will.

Giving to charity is highly emotional. Donors will be more compelled to give when the appeal is tied to a person, animal, or place in need of assistance. Use language and images that appeal to donors emotionally with specific examples of how their gift will benefit someone else. Surveys reveal that donors aren't affected by statistics, but they will respond to depictions of need and ways they can make a difference.

74% of donors say that their primary reason for giving is because “the holidays are a time to be thankful for what you have, and give to those who need it.”

Source: Convio 2010 Holiday Giving Study

Action items:

- Search out compelling examples from among your constituents to share how your nonprofit has impacted the community.
- Ask volunteers to share why they give their time.
- Craft donor letters around individual stories and embed videos of stories in emails and on your website.
- Make sure there is a specific call to action at the end of each story – to donate,



- share socially, or engage a friend.
- Build a library of stories that you can archive online for visitors to read or watch.

Case in Point: CitySquare

In 2010, the group underwent a rebranding and changed its name from Central Dallas Ministries to CitySquare. The new brand was announced in October of that year. During the prime, end-of-year giving season, the organization wanted to gain new supporters and reassure existing donors that, while their name change indicated a growing scope of services, their mission and vision remained as solid and committed as ever.

After a consistent year of regular donor communication, CitySquare kicked off its end-of-year campaign in late October. CitySquare's communication strategy included telling its story through the eyes of several different people who had either received help or contributed to the mission.

One of the first donor emails contained a video telling the story of Ilsie, a woman whose life had been deeply impacted by CitySquare's work. A subsequent email shared the story of a volunteer who was giving both her time and money to support the organization. These and additional personal stories allowed donors to see firsthand how their gifts were benefiting others.

5. CREATE CATALYTIC EVENTS

Catalytic events move your donors into deeper commitments and higher levels of giving. How do we drive people in to a deeper level of commitment at year-end? We have to get them to give stretch gifts—donations that go beyond their usual giving.

These targeted engagements, which we call “catalytic events,” are opportunities to move donors into deeper commitments and higher levels of giving.

Action items:

- Capitalize on a matching challenge so your donors' gifts go twice as far.
- Start giving clubs that donors can join at various levels.
- Offer opportunities for donors to give to specific programs or projects.
- Ask your volunteer base to make a financial investment.
- Call or visit key mid-level and major donors.
- Host a mid-level or major donor year end fundraising event.

6. OPTIMIZE YOUR WEBSITE

Online donations are on the rise, but even those who prefer to give offline will research your organization through your website before making a donation.

Your website gives donors their first true impression of your organization and can be



the most influential factor in whether a donor decides to give. If your website is properly designed and organized, you can collect email addresses, have people register for ongoing communications and updates, and most importantly—capture donations. An optimized website can greatly expand your relationship with online visitors.

Action items:

- Be sure your mission is clearly stated on the homepage.
- Capture email addresses by offering visitors the chance to sign up for updates. Be sure you have a compelling reason for them to give up their email address.
- Add a prominent “Donate Now” or “Give Now” button toward the top of your homepage.
- Test your donation form regularly. Be sure the donate page is easy to use and gives the donor confidence in their decision (charity ratings, testimonials, etc.).
- Make sure your homepage and donation forms are in sync with the theme of your year-end campaign.
- Consider driving traffic to your website through paid search on Google.

7. INTEGRATE YOUR COMMUNICATION CHANNELS

Consistent messaging is only part of an integrated communication strategy. Each communication channel should be linked, timed, and orchestrated according to its particular strength.

Your campaign calendar should reflect planned communications that alternate between email and direct mail. Add in phone calls and in-person visits for key constituents. The integrated approach will reinforce your message and give donors multiple outlets through which to give.

7 out of 10 adults in the U.S. donate through multiple channels.

SEND DONORS ONLINE

Offline communications should also drive people online. Consider, for example, a direct mail letter that references a story of a young girl impacted by your organization. Use compelling copy to send the reader online to hear more of her story. Then, post a video on your website or use other online content that tells how donor gifts are helping many girls like her. When donors hear the rest of the story, offer another chance for them to give.

INCREASE ANNUAL DONOR VALUE

Using multichannel strategies can effectively increase the annual value of a donor. Online engagement will increase the amount that donors give, even if they continue to use offline methods to submit the donations. For example, donor value can increase from \$100 based on one channel to as high as \$200-250 using multiple channels. Since people are conditioned to give generously during the holidays, it's the perfect time to leverage that increase in donor value.



Case in Point: CitySquare

Pursuant strategized with CitySquare to create an effective five-part email series to reach their donor base, complemented by multiple direct mail appeals. The emails linked to professionally produced videos that told moving stories of people who had been deeply impacted by CitySquare's work, including a recipient of their services, a volunteer, and a donor, as well as a message from CitySquare CEO Larry James. These emails and the videos, which were housed on specially designed web pages, linked to an online donation system to facilitate direct donor response.

A newsletter and appeals were sent via direct mail with messaging that was congruent with the stories CitySquare was telling via email and on their website. Recipients of the newsletters were encouraged to go online and hear more about the individual stories. The stories and videos engaged CitySquare's donors and prospects and effectively communicated the value of investing in their work. As a result, CitySquare's 2010 online donations were more than 55 percent higher than in 2009.

GO VIRAL

At year-end, your communications can include links to Facebook and Twitter so your donors can help spread your message through their social media networks. The buzz created online in this manner can help bring in new donors and prospects.

Action items:

- Schedule a series of pre-campaign communications. Cultivate your donors through emails and direct mail prior to making a direct ask.
- Create special landing pages or microsites. Your emails can send donors directly to pages with targeted messages and a donation form, reducing friction in the giving process
- Include links to online donation pages in direct mail pieces. Offer donors multiple ways to give so they can choose their preference.
- Intersperse your emails with communications that don't ask for money. For example, send a Thanksgiving eCard to prospects and donors to keep them engaged.
- Integrate social media. Include "Share on Facebook" and "Share on Twitter" functionality after every donation so users can spread the message to their friends.

8. DO A FINAL EMAIL PUSH THE LAST DAYS OF THE YEAR

Online donations peak during the final days of the year as donors capitalize on the tax benefits of giving. You can wrap up your year-end communications after Christmas with an email push that offers donors a last chance to give.

Consider sending the first of your final emails to your entire donor file, less those who



have already given. Then, for the next send, suppress the names of those who opened the previous last-chance email and resend the email again.

Many people open charity emails on the 31st to make that last possible year-end gift. But don't wait until the last two days to start your campaign! These reminder emails should be the final act in a series of well-timed messages.

Action items:

- Plan the send times so that emails hit inboxes in the morning after 9 AM. Experience shows that email opens decrease through the course of the day.
- Remember that many other organizations may be using the same distribution system as you are. To avoid being late to the queue, have your final emails written, built, and ready to go well before the actual send dates.
- Focus your window between 12/27 and 12/31.

9. THANK YOUR DONORS.

Give your donors something more memorable than a tax receipt in the auto-responder email. That first response to their donation is a great opportunity to creatively express your gratitude. Be sure the messaging and design are consistent with your campaign.

Remember to thank your donors throughout the year, not just at year-end. Set aside time each month to thank donors. Whether you use a personal phone call, a handwritten note, or a letter—let your donors know how important they are to your work and how grateful you are for their partnership.

Action items:

- Most donors expect the automatic email after a donation, so send another follow-up email to thank them a few days later.
- Refrain from making a second ask in your initial thank-you communications.
- Include a video or slideshow in your thank-you emails to show donors the impact of their gifts.

10. CULTIVATE FOR NEXT YEAR.

Believe it or not, your year-end campaign doesn't end on December 31. Plan for strategic follow-up through February to establish and foster ongoing relationships with donors.

You will likely have many new names in your house file at year-end. How will you retain them in the long run? Engage new donors with a targeted series of welcome emails that include information on your mission and your strategic vision for the upcoming year. Keep them informed throughout the year with examples of how their gift is making a difference and offer other ways they can get involved in your work.

SEEK A SUSTAINING GIFT



Did any new donors make a second gift in response to your follow-up emails?

Segment them into a file that receives regular communication to cultivate them toward being a sustaining donor. You can craft targeted messaging to your most faithful givers, such as, “Can we count on you as a partner?” In your ask, seek a monthly sustaining gift that the donor can set up via an electronic funds transfer.

Above all, make sure you inspire your donors all year long so they want to stay involved and engaged in the important work you do.

Action items:

- Tack on several weeks to your communications plan post-holiday season to follow up with new donors.
- After your thank-you emails, schedule a series of welcome emails with more information about your work and your plans for the upcoming year.
- Show them progress on areas of service throughout the year so they see how their gifts are being used.
- Keep them inspired by your story and your mission in every communication.
- Capture donor interests so you can more effectively target future messaging.

The holiday season is a crucial time for nonprofits to capture as much consumer goodwill as possible. With the right approach, you can lift your giving levels as much as 50-70 percent or more compared to your previous year’s results.

For more information on year-end fundraising, contact Pursuant today at 214.866.7700 or email info@pursuantgroup.com.