

YEAR-END GIVING FOR THE SMALL SHOP

September 23, 2024

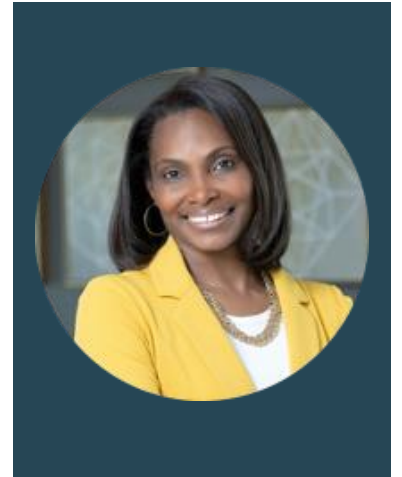


ABOUT US

50+ combined years of experience
with local and national nonprofits
Capital, endowment and annual
campaigns
Strategic planning and
communications

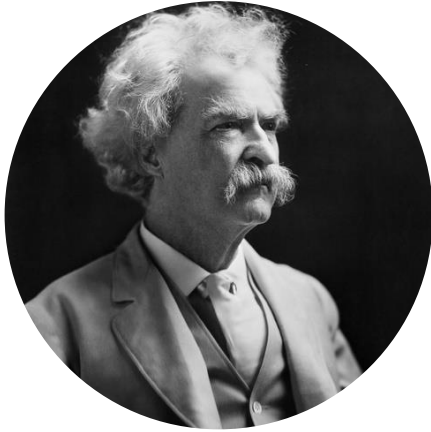


KIM GASKILL



LINDA MCNEIL

AGENDA



**"The secret to getting ahead
is getting started."
-Mark Twain**

- **Welcome/Icebreaker**
- **Giving by the Numbers**
- **What is Fundraising?**
- **Assemble Your Team**
- **Set Your Goal**
- **Target Your Audiences**
- **Tell Your Story**
- **Plan for Success**
- **Closing Thoughts**



Getting to know you.

Why Are You Here?

**Share Your Biggest
Challenge and Greatest
Workshop Hope.**



Giving
USA™

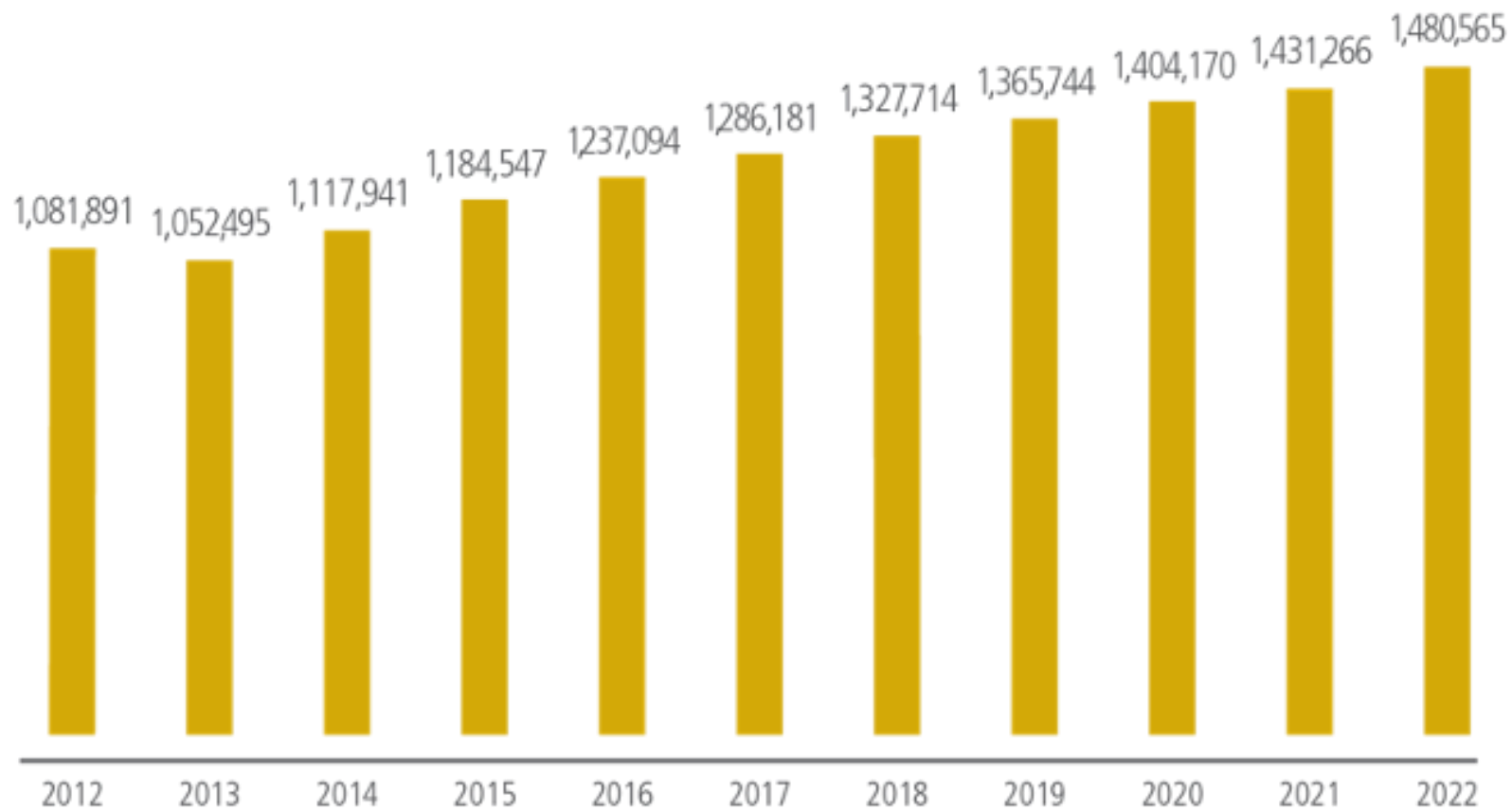
A public service initiative
of The Giving Institute

FUNDRAISING DATA

What is the Giving USA Annual Report?

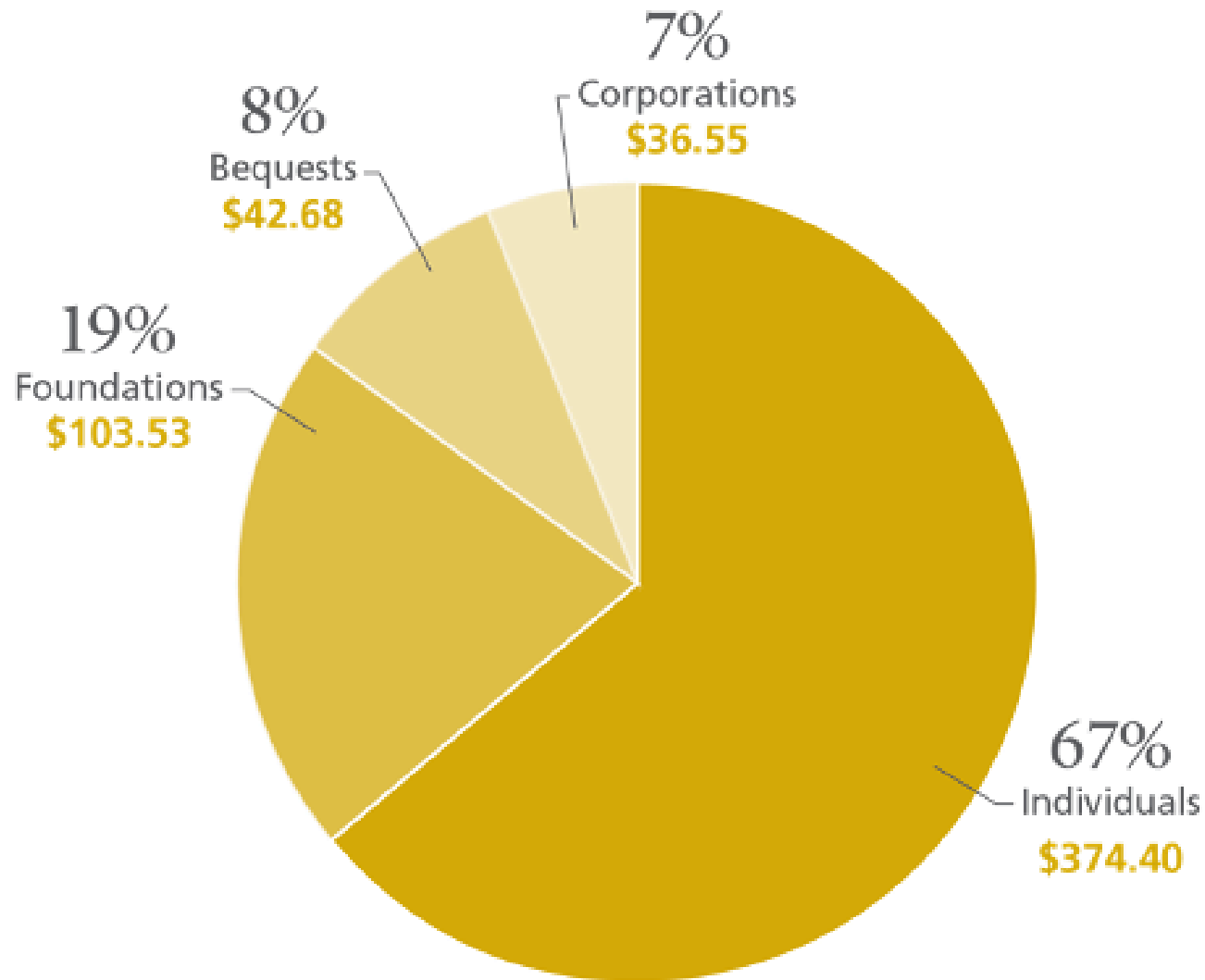
- The longest running, annual report on U.S. charitable giving
- Estimates for:
 - Sources of giving
 - Amounts received by type of organization
- Published by Giving USA Foundation™
- Begun in 1956 by the American Association of Fundraising Counsel, now
- The Giving Institute
- Made possible by contributions from The Giving Institute member firms, foundations, and other donors
- Researched and written by the Indiana University Lilly Family School of Philanthropy

The number of 501(c)(3) organizations, 2012–2022



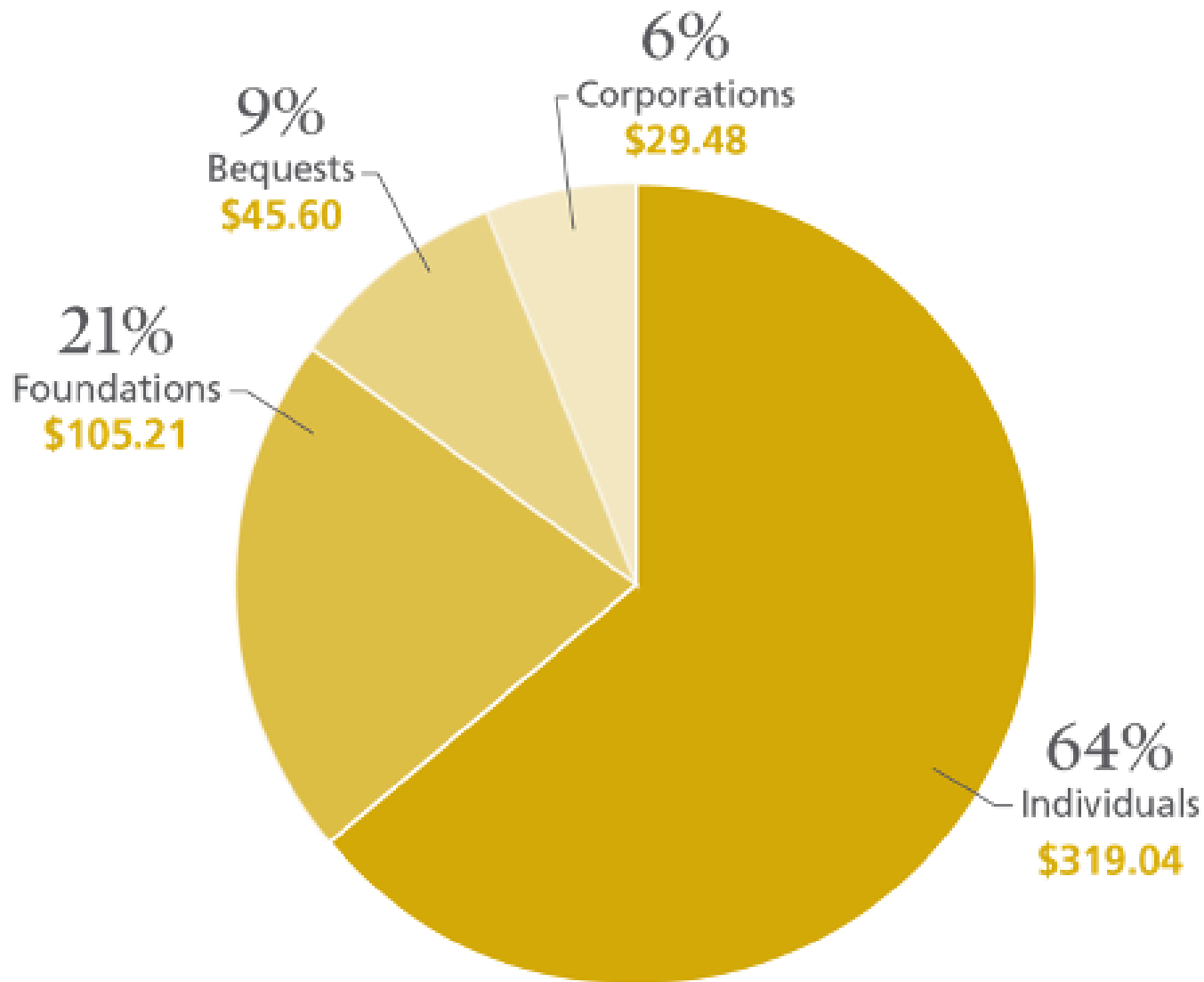
2023 contributions: \$557.16 billion by source of contributions

(in billions for dollars – all figures are rounded)



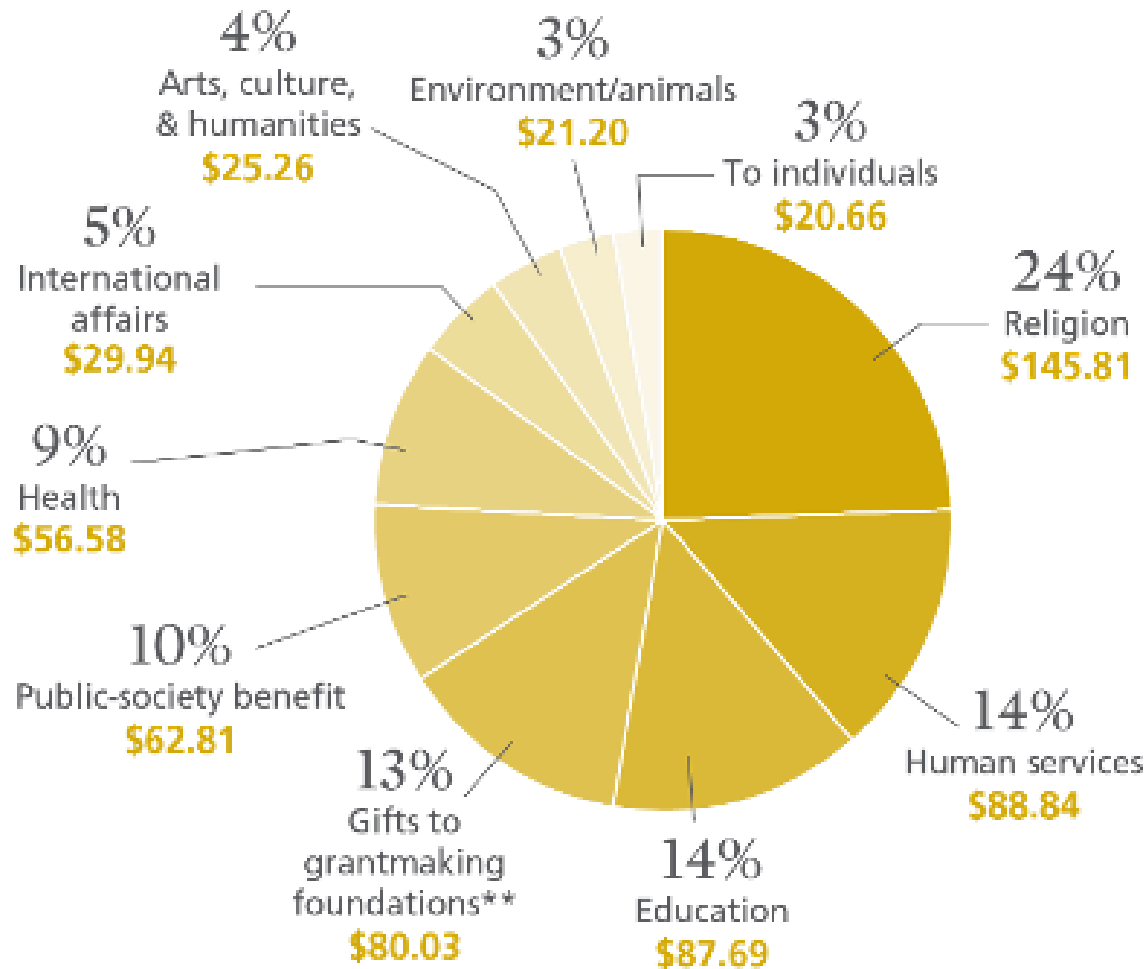
2022 contributions: \$499.33 billion by source of contributions

(in billions for dollars – all figures are rounded)



2023 contributions: \$557.16 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled -\$61.66 billion in 2023.

** Estimates developed by Indiana University Lilly Family School of Philanthropy using data provided by Candid.

WHAT IS FUNDRAISING

Fundraising - (noun) the raising of assets and resources from various sources for the support of an organization or a specific project.

- The Association of Fundraising Professionals
Fundraising Dictionary Online

IN OTHER WORDS

joy
happin

“Fundraising is the gentle art of teaching others the **joy of giving.**”

– Henry A. “Hank” Rosso

FUNDRAISING IS BOTH ART AND SCIENCE

**BUILD THE
FOUNDATION**

**WORK AS HARD AS
YOU CAN**

**FIND THE RIGHT
PEOPLE TO JOIN YOU**

**GIVE ALL THE CREDIT
AWAY**

**AND ALWAYS BELIEVE
IT'S POSSIBLE**

THE FOUNDATION



The Four Ps Fundraising

PEOPLE

PASSION

PURPOSE

PROCESS

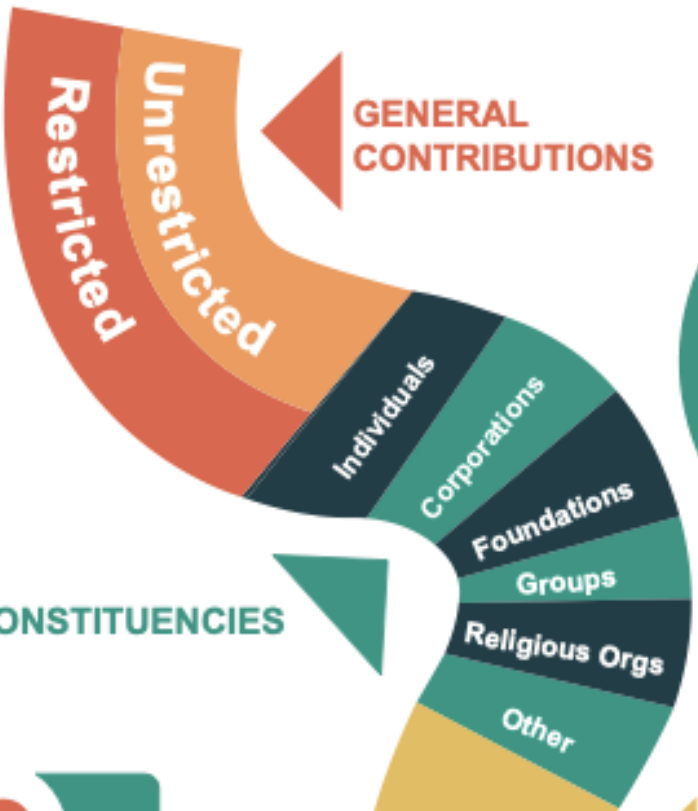
ANNUAL CAMPAIGN ROAD MAP



SINCE 2004

The Annual Campaign is a strategically planned series of activities designed to establish and nurture a broad base of donor support that will ensure the fulfillment of an organization's mission.

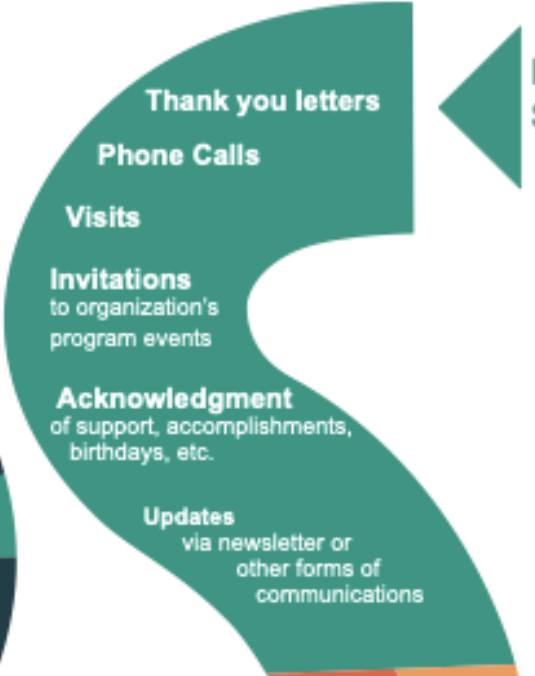
CONSTITUENCIES



GENERAL CONTRIBUTIONS

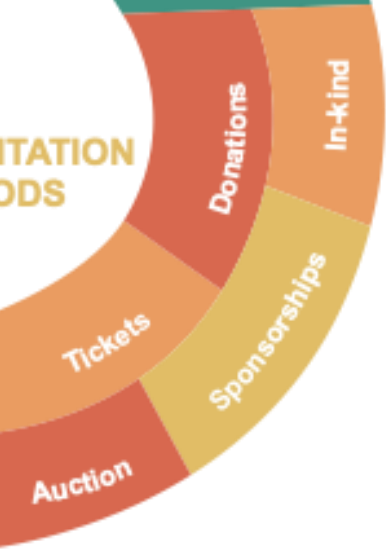


DONOR STEWARDSHIP



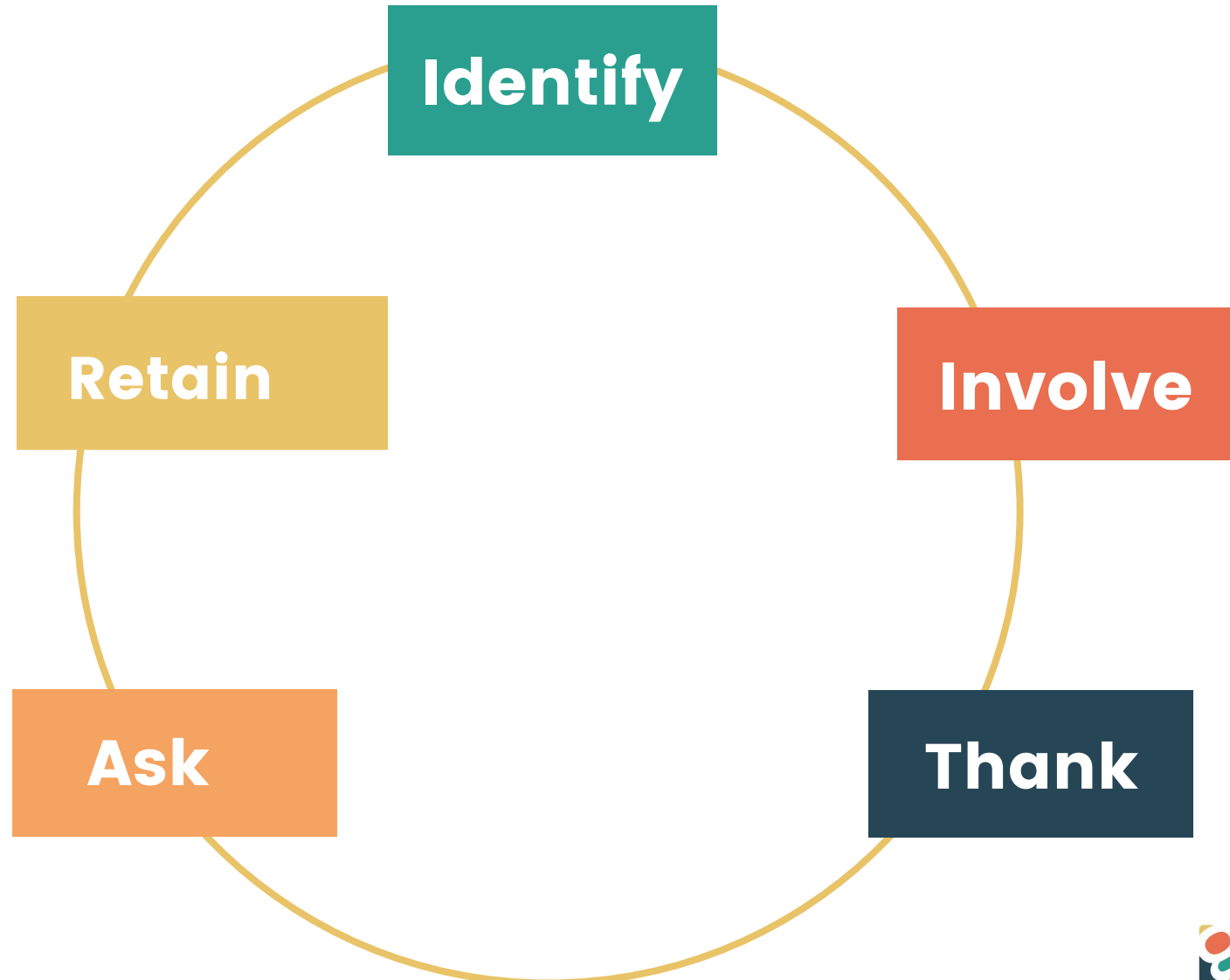
Communications and Annual Campaign strategies should complement each other and work in tandem to reach financial, as well as donor acquisition, retention, engagement, cultivation and stewardship goals.

SPECIAL EVENTS



If the proceeds of your special events go towards general operating then they should be included in your Annual Campaign Goals.

THE CYCLE OF FUNDRAISING



YEAR-END GIVING

Must Have - A Leader

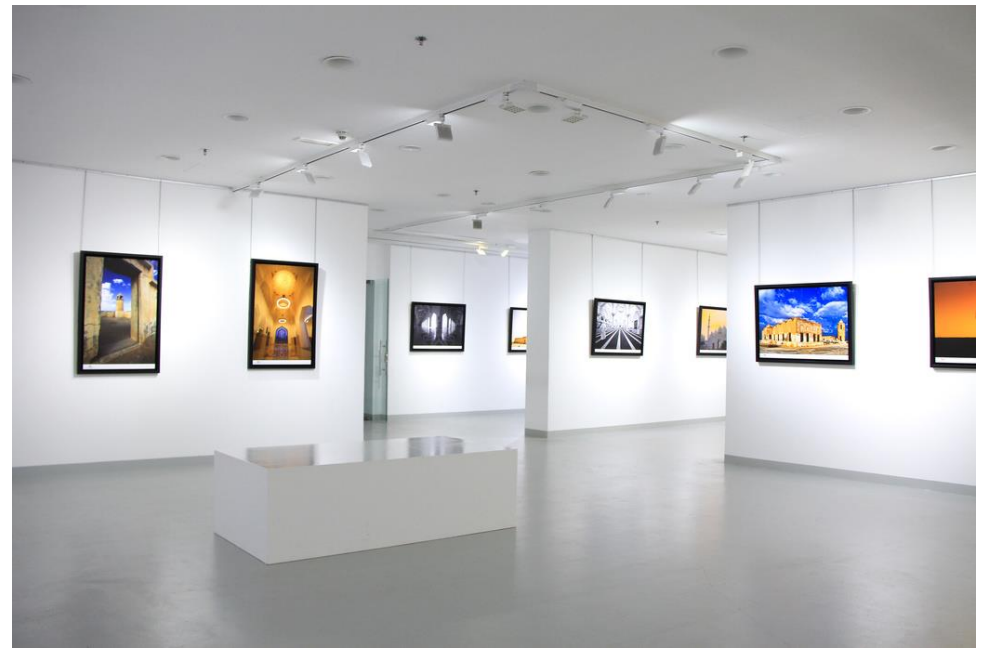
Starts with YOU!

- See the big picture
- Understand where your unit needs to go
- Provide the vision, group's purpose, spell out their contribution and develop the strategy to get there.



THE APPROACH – You're the Curator

- Who's in charge?
- Who's your audience?
- How do you want them to feel?
- And by when?



ASSEMBLE YOUR TEAM

Utilizes everyone's strengths.

Director of Development – creates the process of outreach to donors by organizing and using others to seek funds

Executive Director – the key spokesperson and lead fundraiser for your organization

Database Administrator – donor information management and analysis

Volunteers/Ambassadors – help support your fundraising efforts; they do not have to be Board members

Board of Directors – fiscal stewardship & strategic advice about financial direction; support fundraising efforts

HOW CAN THEY HELP YOU?

Utilizes everyone's strengths.

Peer Advisor: (Maven)

Qualifying the donor prospect through identification, information and uncovering their interest.

Door Opener: (Connector)

Introducing the donor to the mission/cause and fostering their interest and involvement.

Storyteller: (Salesman)

This supports all stages of the donor cultivation cycle reinforcing the reason why the organization is essential and necessary.

YEAR-END GIVING

Must Have – Board Leadership

Meet them where they are:

- Have all Board members given?
- If yes, can you rally them to a tangible new opportunity?
- Can you ask them to increase to a gift amount that is more meaningful.



YEAR-END GIVING

Must Have – \$ Goal (s)

Claim a dollar goal by
December 31, 2024.

- Set a clear FR Goal - **Activity**
- How much must you raise by year-end?
- Be realistic.
- Gain consensus from your ED and Board if necessary.
- Ensure expectations are aligned.



YEAR-END GIVING - E-mail Data

EMAIL MESSAGING

SCORECARD

- Email list sizes increased by 7% in 2023, after 5% and 8% growth in the previous two years.
- Email revenue declined by 7% on average, while the share of all online revenue directly sourced to email was 16%.
- For every 1,000 fundraising messages sent, nonprofits raised \$76. This marks a 20% decrease from 2022.
- Nonprofits sent an average of 59 email messages per subscriber in 2023. There was a 12% increase in volume from the previous year.
- The average response rate for advocacy email was 1.4%, a 10% decline from the previous year.
- The average response rate for fundraising email was 0.07%, a 16% decrease compared to 2022.

Source M+R Benchmarks

YEAR-END GIVING

Must Have – Major Gifts

Why Major Gifts Matter

High Impact: Major gifts can significantly boost year-end totals and help achieve financial goals.

- High-Level Gifts (\$5,000+)
- Mid-Level Gifts (\$2,500 - \$4,999)
- Entry-Level Major Gifts (\$1,000 - \$2,499)

Effective Engagement:

- Right Person, Right Role
- Build Relationships
- Say Thank you.

YEAR-END GIVING

Must Have – **A Plan**

Intentional, specific and goal-oriented.

Activity

- Identify your sources to be targeted.
- Set financial objectives for each source.
- Within the sources segment and tailor your strategies.

YEAR-END GIVING

Must Have - **A Path**

Create Your Gift Table – Homework

- What's the total to be raised for major gifts?
- Who are my top prospects and how many do I have?
- What amount can I expect to receive from each-qualify within a range
- What does the total path look like?

YEAR-END GIVING

Must Have – A Rallying Cry

Has a consistent and compelling rallying cry.

- What are you raising money for?
- Why is it urgent?
- What happens if you don't raise the funds?
- What's a deadline that you can use to rally around. – **Activity**



YEAR-END GIVING

Must Have – **One Story**

- Keep your message consistent across all appeals: emails, follow-ups, everything.
- Make it your rallying cry—simple, direct, and memorable.
- Tip: Say it square, then say it with flair!

YEAR-END GIVING

Must Have – **Ways To Tell Your Story**

- Write the letter or email from one person: participant, board member, or CEO.
- Use **negative framing**: Fear of loss grabs attention more than potential gain.
- Share a **startling fact** (e.g., "1 in 5 children go to bed hungry").
- Use **personal anecdotes** and **relate to the time of year** (Thanksgiving, holidays, etc.).

YEAR-END GIVING

Must Have – **Urgency & Call to Action**

URGENCY & CALL TO ACTION

Create **urgency**: Tie it to a challenge or immediate need.

Include the **call to action** throughout—don't save it just for the end.

Use **photos**: Show the need or a person who embodies it.

YEAR-END GIVING

Must Have – Diversified Channels

- Choose your fundraising channels: Direct mail, email solicitation, face-to-face fundraising
- Leverage social media and digital platforms
- Ensure all tools are aligned with your goals and audiences
- Establish your messages and equip everyone to stay on point

YEAR-END GIVING

Must Have – Donor-centered

- Frame your accomplishments in a **donor-centered way** (e.g., "Because of you, we are able to provide food and shelter...").
- The **P.S.** is key: include a thank you, the ask, and where/when to give.

YEAR-END GIVING

Must Have – End of year frequency

- Beginning in October stagger your communication at least every two weeks until mid-December.
- Send weekly communications during the last two weeks of the year.
- Send daily digital communications during the last four days of the year.

December giving made up 26% of all online revenue, and 34% of one-time online revenue. Donations made on December 31 accounted for 5% of 2023 revenue.**

*Source Bloomerang

**Source M+R Benchmarks

YOUR TOOLKIT

1

Email Script/PS

Ensure easy click throughs to give or reach you

3

Elevator Pitch

Internalized and personal

5

Website

Consistent messaging, easy to find how to give

2

Letters/E-Solicitations

Consistent across all platforms, personalize with notes, lift-letters

4

Newsletters/Media

Year-end newsletter, media pitches, align with the ask

6

Thank you.

Ensure your gift acknowledgement tells the same story.

YEAR-END GIVING

Must Have – Segment Your Donors

Your best donor is the one you already have. Segment by:

- **Recent:** Last 12-24 months
 - **Frequent:** More than one gift in 12 months
 - **Gift amount:** Major gifts, broad-base
 - **Type of Donor:** Corporate, Individual, Faith-based, etc.
- Tailor your ask to acknowledge their past support.



IT ALL COMES DOWN TO PEOPLE

The best gifts happen when
**the right person asks
the right person for
the right gift at
the right time.**

YEAR-END GIVING

Must Have – **Timeline & Calendar**

KEY CONSIDERATIONS FOR YEAR-END SUCCESS – **Activity**

- **Schedule solicitations:** Plan when each ask will go out.
- **Outline your tactics:** Define how you'll reach donors (mail, email, face-to-face).
- **Work backwards:** Allow time for development, design, and approvals.
- **Align with organizational happenings:** Ensure your campaign fits seamlessly with other events and initiatives.
- **Incorporate the Board:** Be specific with how they can help and by when.

YEAR-END GIVING

Must Have - **Accountability**

ACCOUNTABILITY FOR YEAR-END GIVING

Track progress weekly and include in your monthly report:

- **# of calls made:** Stay on top of assignments and progress.
- **\$ raised by donor type:** Break down funds from individuals, corporations, etc.
- **\$ raised by solicitation:** Analyze results by method (mail, email, in-person).
- **\$ raised by gift level:** Track how much is raised at each giving level to meet goals.

STEP ONE: EVALUATE & SET
YOUR FINANCIAL GOAL

	FY 2022	FY 2023	FY 2024 (projected)
Major Donors (\$1,000+)	\$31,000	\$35,000	\$40,000
Mid-level donors (\$250-\$999)	\$14,500	\$16,000	\$20,000
Low-level donors (<\$249)	\$9,800	\$10,000	\$15,000
TOTAL INDIVIDUAL DONORS	\$55,300	\$61,000	\$75,000
BUSINESS/CORPORATE DONORS	\$12,500	\$15,000	\$25,000
TOTAL INCOME	\$67,800	\$76,000	\$100,000

ALIGN YOUR GIFT TABLE WITH
YOUR FINANCIAL GOAL

SAMPLE END OF CALENDAR YEAR GIFT TABLE		
GOAL - \$100,000		
Gifts Needed	Gift Level	Total
2	\$ 10,000	\$ 20,000
3	\$ 5,000	\$ 15,000
6	\$ 2,500	\$ 15,000
10	\$ 1,000	\$ 10,000
25	\$ 500	\$ 12,500
30	\$ 250	\$ 7,500
50	\$ 100	\$ 5,000
many	Under \$100	\$ 15,000
126+		\$ 100,000

GOAL: \$100,000 by December 31, 2024

Individual Donors Goal - \$75,000

- \$40,000 in major gifts of \$1,000+
 - Renew 85% of FY '23 Major gifts totaling \$29,750
 - Secure three (3) new gifts of 1,000 or more
- \$20,000 in mid-level giving
 - Renew 85% of FY '23 mid-level gifts totaling \$17,000
 - Move 10% of lower-level donors to mid-level donors
 - Identify at least three new prospects from each board member
- \$15,000 in lower-level gifts
 - Solicit these prospects via direct mail appeals and e-solicitations

Business/Corporate Giving Goal: \$25,000

- Renew support from FY '23 totaling \$15,000
- Identify 10 potential prospects; secure at least four (4) new gifts by year end

STEP THREE: CREATE IMPLEMENTATION CALENDAR

	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
MAJOR GIFTS		Fall Solicitation Face-to-Face	Follow-up	End of the year mailing/e-solicitations
BROAD-BASED GIFTS		Fall Solicitations	Follow-up	End of year mailing/e-solicitations
CORPORATE		Face-to-Face Meetings	Face-to-Face Meetings	Face-to-Face Meetings
OTHER GROUPS		TBD per group	TBD per group	TBD per group
PRINT & E-COMMUNICATIONS		Newsletter	E-newsletter	E-newsletter
SOCIAL MEDIA		Facebook, Instagram, Tiktok and Snapchat aligned with Annual Campaign message	Facebook, Instagram, Tiktok and Snapchat aligned with Annual Campaign message	Facebook, Instagram, Tiktok and Snapchat aligned with Annual Campaign message
STEWARDSHIP		Stewardship meetings	Thanksgiving Card OR	Holiday Card
CULTIVATION		Cultivation meetings	Thanksgiving Card	Holiday Card



Take Action!

ACTIVITY

BACK TO YOU

YOU HAVE TO BELIEVE IT'S POSSIBLE...

- Unshakable conviction in the benefits and impact of your cause
- The belief that people are willing to give but must be asked
- The belief that, even in bad times, wealth exists in your community and your organization is deserving of this support
- Willingness to step outside your comfort zone



CLOSING THOUGHTS





THANK YOU

GET IN TOUCH WITH US

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